

# CitiManager<sup>®</sup> Site User Guide

Commercial Card

Non-Cardholder End-to-End User Guide

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Treasury and Trade Solutions



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# User Guide Overview

## Document Scope

The **CitiManager® Site End-to-End User Guide for Non-cardholders** provides detailed step-by-step instructions for all CitiManager Site functions available to Non-cardholders.

For a consolidated user guide, refer to the **CitiManager Quick Start Guide for Non-cardholders**.

## Your Access May Vary

The functions to which you have access are based on your role and entitlements. You may not have entitlements for all the functions described in this User Guide. Some fields are defined at the company level so there may be variances in what is described in this User Guide based on your company's setup.

## A Note About Navigation

Most step-by-step instructions in this user guide assume you are already logged into the CitiManager Site. Refer to the **Log In to the CitiManager Site** topic for the steps required to log in.

Unless otherwise noted, the step-by-step instructions begin from the CitiManager Site **Home** screen.

## Web-browser Compatibility

The CitiManager Site is compatible with the latest versions of Chrome and Edge.

# 1. Getting Started in the CitiManager Site

## What is CitiManager?

### Description

The CitiManager Site is a powerful online tool that allows Non-cardholders to efficiently manage their card programs. Depending on your company's setup, you will be able to:

- View accounts, statements, balances and transactions
- Dispute transactions
- View authorizations/declines
- View, approve or reject application and maintenance requests
- Perform account maintenance
- Create users
- Activate and deactivate users
- Assign applications and company
- Set passcodes
- Manage alerts
- Manage your profile
- Access on-demand training resources in the Learning Center

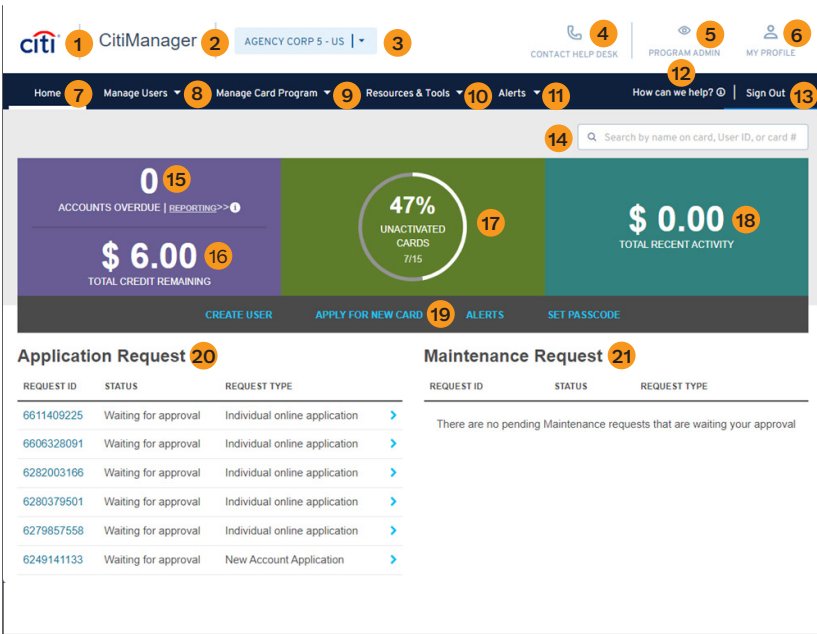
## Basic Navigation

### Description

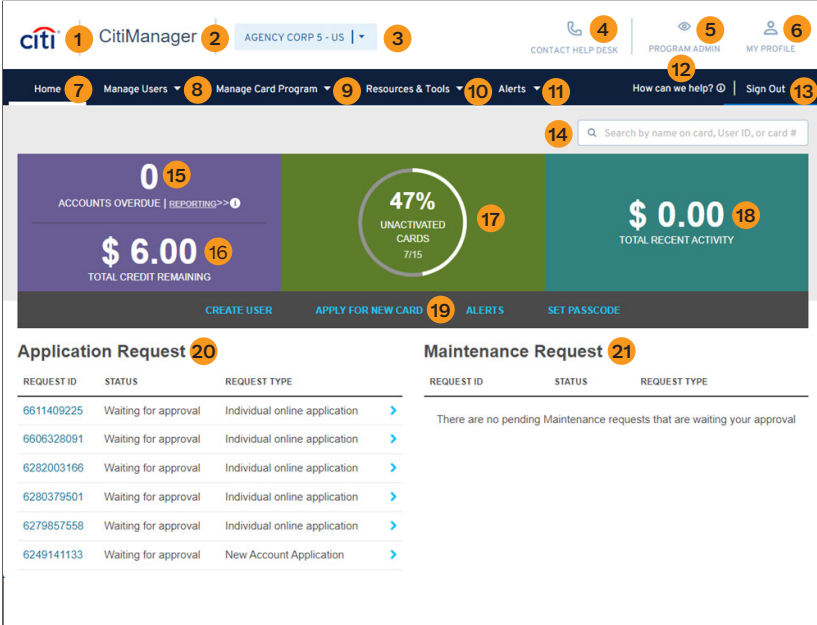
After you log in to the CitiManager Site, the **Home** screen displays. The **Home** screen acts as a dashboard and displays a high level metric summary of your program — including accounts overdue, total credit remaining, number of unactivated cards and recent activity at your hierarchy level. You can also view a list of application and maintenance requests.

Use the navigation options from the header and the navigation bar as well as quick links to navigate to additional program information and preferences.

## CitiManager Home Screen — Navigation

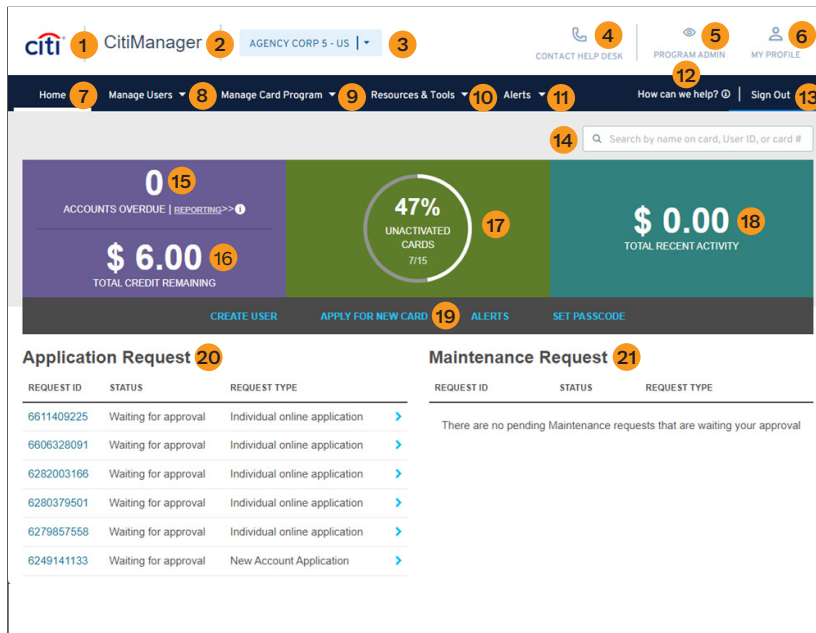
Screen	Descriptions
 <p>The screenshot shows the CitiManager Home Screen. At the top is the header section with the Citi logo (1), CitiManager link (2), company name 'AGENCY CORP 5 - US' (3), Contact Help Desk icon (4), Program Admin icon (5), and My Profile icon (6). Below the header is a navigation bar with links: Home (7), Manage Users (8), Manage Card Program (9), Resources &amp; Tools (10), Alerts (11), How can we help? (12), and Sign Out (13). The main content area features three large cards: 'ACCOUNTS OVERDUE   REPORTING' (15) showing '\$ 6.00' (16) for 'TOTAL CREDIT REMAINING', 'UNACTIVATED CARDS' (17) showing '47%' (7/15), and 'TOTAL RECENT ACTIVITY' (18) showing '\$ 0.00'. Below these are buttons for 'CREATE USER', 'APPLY FOR NEW CARD' (19), 'ALERTS', and 'SET PASSCODE'. The bottom section has two tables: 'Application Request' (20) and 'Maintenance Request' (21). The Application Request table lists several requests with IDs, statuses, and types. The Maintenance Request table shows a message: 'There are no pending Maintenance requests that are waiting your approval'.</p>	<h3>Header Section</h3> <ol style="list-style-type: none"> <li>1. Click the <b>Citi</b> logo on the far left-side of the header to be directed to the Citi Commercial Cards website.</li> <li>2. Click the <b>CitiManager</b> link on the left-side of the header to return to the <b>Home</b> screen.</li> <li>3. Your company name displays on the left-side of the header. If you have access to more than one company, you may select another one using the drop-down list.</li> <li>4. If you need assistance from the Helpdesk, click the <b>Contact Help Desk</b> icon that displays on the right-side of the header.</li> <li>5. If you have both Cardholder and Non-cardholder access to the CitiManager Site, you can toggle between both accounts by positioning your mouse over the role icon that displays on the right-side of the header and selecting the desired role.</li> <li>6. Click the <b>My Profile</b> icon on the far right-side of the header to access or modify your profile details.</li> </ol> <h3>Navigation Bar</h3> <ol style="list-style-type: none"> <li>7. Click the <b>Home</b> link to return to the <b>Home</b> screen.</li> <li>8. Position your mouse over the <b>Manage Users</b> drop-down menu to complete a new card application for a Cardholder, create a new CitiManager Site account for Non-cardholders, perform a user search and view requests. Once you have completed a search, the <b>Cardholder Details</b> or <b>Non-Cardholder Details</b> screens can be used to view account information and are the launching point to perform account activities using the links on the left-side of the screen.</li> </ol>

### Home Screen

Screen	Descriptions
 <p><b>Home Screen</b></p>	<p>9. Position your mouse over the <b>Manage Card Program</b> drop-down menu to perform bulk hierarchy transfers, perform document management (e.g. bulk online maintenance, bulk online applications, upload the supervisor list), print multiple statements, run CitiManager Reports, set alerts for a hierarchy, set passcodes and pre-fill application form data and view your hierarchy. The functions available are based on your company's setup.</p> <p>10. Position your mouse over the <b>Resources &amp; Tools</b> drop-down menu to access the Learning Center, access the Library, view Links &amp; Help, view messages and access Reporting and Expense Management if you have the entitlements. You can also perform a search for Non-cardholders to view their hierarchy, role, full name, user profile e-mail address.</p> <p>11. Position your mouse over the <b>Alerts</b> drop-down menu to manage your alert subscriptions, view the audit log, and the view on-demand mobile alert information.</p> <p>12. Click the <b>How can we help?</b> link to open a guided self-service window. Once the window is open you can search for a topic or click on the Quick Actions that display to open step-by-step instructions. The window will remain open until you close it so you can reference the instructions while you perform the task. The topics available are limited to frequently asked questions and are based on your entitlements. For step-by-step instructions for all functions, refer to the CitiManager Non-cardholder End-to-End Guide. The full library of User Guides and web-based training is available from the Learning Center.</p> <p>13. Click the <b>Sign Out</b> link on the far right-side of the navigation bar to log out of the CitiManager Site.</p>



## Screen



The screenshot shows the CitiManager Home Screen. At the top, there is a navigation bar with the Citi logo (1), 'CitiManager' (2), and a dropdown menu for 'AGENCY CORP 5 - US' (3). To the right of the navigation bar are links for 'CONTACT HELP DESK' (4), 'PROGRAM ADMIN' (5), and 'MY PROFILE' (6). Below the navigation bar is a secondary navigation bar with links for 'Home' (7), 'Manage Users' (8), 'Manage Card Program' (9), 'Resources & Tools' (10), 'Alerts' (11), 'How can we help?' (12), and 'Sign Out' (13). Below the secondary navigation bar is a search bar (14) with the placeholder text 'Search by name on card, User ID, or card #'. The main content area features three dashboard tiles: 'ACCOUNTS OVERDUE | REPORTING>>' (15) showing '\$ 6.00' (16) for 'TOTAL CREDIT REMAINING', '47% UNACTIVATED CARDS 7/15' (17), and '\$ 0.00' (18) for 'TOTAL RECENT ACTIVITY'. Below the dashboard tiles are four quick links: 'CREATE USER' (19), 'APPLY FOR NEW CARD' (19), 'ALERTS' (19), and 'SET PASSCODE' (19). At the bottom, there are two sections: 'Application Request' (20) and 'Maintenance Request' (21). The 'Application Request' section contains a table with columns 'REQUEST ID', 'STATUS', and 'REQUEST TYPE'. The 'Maintenance Request' section contains a message: 'There are no pending Maintenance requests that are waiting your approval'.

REQUEST ID	STATUS	REQUEST TYPE
6611409225	Waiting for approval	Individual online application
6606328091	Waiting for approval	Individual online application
6282003166	Waiting for approval	Individual online application
6280379501	Waiting for approval	Individual online application
6279857558	Waiting for approval	Individual online application
6249141133	Waiting for approval	New Account Application

## Home Screen

## Descriptions

## Screen Components

14. From the search field located below the navigation bar on the right, you may perform a search by typing a first or last name or a card account number and then press **Enter** on your keyboard. The **Search Result** screen displays.
15. The top of the first dashboard tile is **Accounts Overdue** which displays the number of accounts that are currently past due. The number of accounts displayed is recent from the previous cycle. This applies to individually billed programs only.
16. The bottom of the first dashboard tile is **Total Credit Remaining** which displays the total remaining credit for the hierarchy assigned to you. This tile only displays a dollar amount for centrally billed programs. For individually billed programs, an amount does not display.
17. The second dashboard tile is **Unactivated Cards** which displays the number of cards that have not been activated. The total includes both open and closed individual accounts.
18. The third dashboard tile is **Total Recent Activity** which displays the total amount of activity in the current billing cycle.
19. Use the quick links displayed below the dashboard in the middle of the screen to create a user, apply for a new card, set your personal alerts and set a passcode.
20. In the **Application Request** section located below the quick links on the left-side of the screen, you can view a list of pending **Application Requests** that are waiting for your review.
21. In the **Maintenance Request** section located below the quick links on the right-side of the screen, you can view a list of pending **Maintenance Requests** that are waiting for your review.

## Choose Your Language

### Key Concepts

The CitiManager Site is available in 28 languages. You can change the language in which the CitiManager Site displays by selecting it from the **Login** screen before you log in to the site.

### Step-by-Step Instructions

Step	Action
1.	Navigate to <a href="http://www.citimanager.com/login">www.citimanager.com/login</a> . <i>The CitiManager Site Login screen displays.</i>
2.	From the language drop-down list that displays on the top-right corner of the screen, select the desired language. <i>CitiManager Site text displays in the selected language.</i>

## Register as a Non-cardholder for the CitiManager Site

### Key Concepts

As a Non-cardholder it's possible to register for the CitiManager Site so you can manage your card program.

In order to register, another Non-cardholder must set up a profile first which will generate a Registration ID and a Registration Passcode.

Citi will send one e-mail with your Registration ID and another with your Registration Passcode. These e-mails are required during the registration process.

Once you receive your registration details, you must register within 60 days or your details will expire. You will be reminded every 15 days until your registration is complete.

The Registration ID and Passcode can be re-sent by another Non-cardholder.

### Step-By-Step Instructions

Step	Action
1.	Navigate to <a href="http://www.citimanager.com/login">www.citimanager.com/login</a> . <i>The CitiManager Site Login screen displays.</i>
2.	Click the <b>Register as a Non Cardholder</b> link. <i>The Registration ID/Passcode screen displays.</i>
3.	In the <b>Registration ID</b> field, type the Registration ID supplied in the e-mail sent from the CitiManager Site.
4.	In the <b>Registration Passcode</b> field, type the Registration Passcode supplied in the e-mail sent from the CitiManager Site.
5.	Click the <b>Continue</b> button. <i>The Contact Information screen displays.</i>
6.	From the <b>Country</b> drop-down list, select your country.
7.	In the <b>Zip/Postal Code</b> field, type your zip code.
8.	Click the <b>Continue</b> button. <i>The Sign On Details screen displays.</i> <b>Note:</b> A link displays at the bottom of the screen for Canadian users directing them to the Canadian Privacy Statement.

Step	Action
9.	In the <b>Username</b> field, type your desired username.
10.	In the <b>Password</b> field, type and confirm a password that meets the requirements. <b>Note:</b> The password requirements display in a window as you type your password. A checkmark displays when each requirement is fulfilled.
11.	In the <b>Confirm Password</b> field, re-type the password.
12.	Verify the information in the <b>Zip/Postal Code</b> , <b>Contact Number</b> and <b>User Profile E-mail Address</b> fields and update if necessary.
13.	From the <b>Helpdesk Verification Question</b> drop-down list, select a question that will be used to verify your identity should you need to reset your password or retrieve your username.
14.	From the <b>Helpdesk Verification Answer</b> field, type an answer to the Helpdesk verification question you selected.
15.	Click the <b>Continue</b> button. <i>The Confirm screen displays.</i>
16.	Review the details and click the <b>Confirm</b> button. <i>A confirmation message displays indicating registration was successful and a confirmation e-mail is sent to the address entered during the registration process.</i>
17.	Click the <b>OK</b> button. <i>The CitiManager Site Login screen displays. When you log in for the first time, you will be prompted to select and answer three challenge questions.</i>
18.	Type your user ID and password and click the <b>Sign On</b> button. <i>The Reset Challenge Questions and Answers screen displays.</i> <b>Note:</b> As an extra security measure, each time you log in you may be required to answer one of the challenge questions.
19.	Select and answer three challenge questions. <b>Note:</b> To confirm the challenge question answers, you will be asked to answer the questions twice during the set-up process.
20.	Click the <b>Save</b> button. <i>The CitiManager Site Home screen displays.</i>

## Log In to the CitiManager Site

### Key Concepts

In order to access the CitiManager Site, you must log in to the application using a valid username and password and then you may be asked to answer a challenge question.

You can only have one session of CitiManager open at a time.

As an additional layer of security, you may be required to enter a one-time passcode (OTP) during the log in process. If prompted, select a receipt option from the available options. The available options are based on your profile, and may include text message, call office or call mobile phone. Once you enter the OTP, the CitiManager Site **Home** screen displays and you will not need to answer a challenge question.

If you cannot remember your username or password, refer to the **Retrieve Forgotten Username** or **Reset Forgotten Password** topics in this User Guide.

If you need additional information about CitiManager Site registration, refer to the **Register as a Non-cardholder** topic in this User Guide.

### Step-by-Step Instructions

Step	Action
1.	Navigate to <a href="http://www.citimanager.com/login">www.citimanager.com/login</a> . <i>The CitiManager Site Login screen displays.</i>
2.	In the <b>User ID</b> field, type your username.
3.	In the <b>Password</b> field, type your password.
4.	Click the <b>Sign On</b> button. <i>The Challenge Question or One-time Passcode receipt options screen displays.</i> <b>Note:</b> When you log in to the CitiManager Site for the first time you must select and answer three challenge questions. Each time you log in, you may be asked to answer one of the challenge questions. Depending on your organization's set-up, the <b>One-time Passcode</b> receipt option screen may display. Select how you would like to receive your one-time passcode and click the <b>Continue</b> button. When the eight-digit code is received, type it in the field displayed on the CitiManager Site <b>One-time Passcode</b> screen and click the <b>Continue</b> button. If you enter a OTP, you will not be prompted to answer a challenge question and the CitiManager Site <b>Home</b> screen displays.
5.	If necessary, answer the challenge question and click the <b>Continue</b> button. <i>The CitiManager Site Home screen displays.</i> <b>Note:</b> You have three attempts to answer the challenge question correctly.

### Log Out of the CitiManager Site

#### Key Concepts

When logging out of the CitiManager Site, be sure to use the **Sign Out** link on the far right-side of the navigation bar so the system closes all your current session information properly.

Do not close the CitiManager Site by clicking the tab **Close [X]** button. Even though the tab closes, your session remains open. You will either need to clear your cache or close your browser completely to end the session.

You will be automatically logged out of the CitiManager Site after 15 minutes of inactivity. If you receive an expiration warning message, you can click the **OK** button to keep your session open.

### Step-by-Step Instructions

Step	Action
1.	From the far right-side of the navigation bar, click the <b>Sign Out</b> link. <i>The screen refreshes and the CitiManager Site Login screen displays.</i>

## Retrieve Forgotten Username

### Key Concepts

If you forget your username, you will need to retrieve it in order to log in to the CitiManager Site. When you are finished submitting the request, your username will be sent to your e-mail address.

To retrieve your username, the following information is required:

- Your first and last name
- Your country
- Your contact phone number
- The zip code/postal code associated with your user profile
- The e-mail address associated with your user profile
- Your Helpdesk verification answer

### Step-by-Step Instructions

Step	Action
1.	Navigate to <a href="http://www.citimanager.com/login">www.citimanager.com/login</a> . <i>The CitiManager Site Login screen displays.</i>
2.	Click the <b>Forgot User ID</b> link. <i>The Forgot User ID — Select Role screen displays.</i>
3.	Select the <b>Non-Cardholder</b> role radio button and click the <b>Continue</b> button. <i>The Enter Details screen displays.</i>
4.	In the <b>First Name</b> field, type your first name.
5.	In the <b>Last Name</b> field, type your last name.
6.	From the <b>Country</b> drop-down list, select your country.
7.	In the <b>Contact Number</b> field, type your contact phone number. <b>Note:</b> Only numeric values are allowed in this field.
8.	In the <b>Zip/Postal</b> code field, type the zip code associated with your user profile.
9.	In the <b>E-mail Address</b> field, type the e-mail address associated with your user profile.
10.	In the <b>Confirm E-mail Address</b> field, re-type the e-mail address that is associated with your user profile.
11.	Click the <b>Continue</b> button. <i>The Helpdesk Verification screen displays.</i>
12.	In <b>Helpdesk Verification Answer</b> field, type the answer to the verification question and click the <b>Continue</b> button. <i>The OTP Details screen displays.</i>
13.	From the <b>OTP Details</b> screen, select the appropriate contact option and click the <b>Continue</b> button. <i>A passcode is sent via text message or phone call depending on the option you have selected.</i>
14.	In the <b>One-Time Passcode</b> field, type the passcode you were provided and click the <b>Continue</b> button. <i>A confirmation message displays.</i>
15.	Click the <b>OK</b> button. <i>The CitiManager Site Login screen displays and the system sends your username to the e-mail address on file.</i>

## Reset Forgotten Password

### Key Concepts

If you forget your password, you will need to reset it in order to sign in to the CitiManager Site.

To reset your password, the following information is required:

- A valid username
- The zip/postal code associated with your profile
- The e-mail address associated with your profile
- Your Helpdesk verification answer

### Step-by-Step Instructions

Step	Action
1.	Navigate to <a href="http://www.citimanager.com/login">www.citimanager.com/login</a> . <i>The CitiManager Site Login screen displays.</i>
2.	Click the <b>Forgot Password?</b> link. <i>The Forgot Password — Select Role screen displays.</i>
3.	Select the <b>Non-Cardholder</b> role radio button and click the <b>Continue</b> button. <i>The Forgot Password — Enter Details screen displays.</i>
4.	In the <b>Username</b> field, type your username.
5.	In the <b>Zip/Postal Code</b> field, type the zip code associated with your user profile.
6.	In the <b>E-mail Address</b> field, type the e-mail address associated with your user profile.
7.	In the <b>Confirm E-mail Address</b> field, re-type the e-mail address associated with your user profile.
8.	To validate the information entered, click the <b>Continue</b> button. <i>The Helpdesk Verification screen displays.</i>
9.	In the <b>Helpdesk Verification Answer</b> field, type the answer to the verification question and click the <b>Continue</b> button. <i>The OTP Details screen displays.</i>
10.	From the <b>OTP Details</b> screen, select the appropriate contact option and click the <b>Continue</b> button. <i>A passcode is sent via text message or phone call depending on the option you have selected.</i>
11.	In the <b>One-Time Passcode</b> field, type the passcode you were provided and click the <b>Continue</b> button. <i>A confirmation message displays indicating a temporary message has been created and sent to your e-mail address.</i>
12.	Click the <b>OK</b> button. <i>The CitiManager Site Login screen displays.</i>

## View a Different Company

### Key Concepts

Each Level 1 Hierarchy entity is referred to as a separate company. As a Non-cardholder, you may have access to accounts in different companies if your organization has more than one. For example, you may manage multiple travel programs or a travel program and a purchase program.

When logging in to the CitiManager Site, your view defaults to a company which has been set as your primary company.

You can use the **Company** drop-down list that displays in the header of any CitiManager Site screen to toggle between them. If the **Company** drop-down list is not available, you only have access to one company.

To change the company that displays as the default, refer to the **Change Primary Company** topic in this User Guide.

### Step-by-Step Instructions

Step	Action
1.	<p>From the header, position your mouse over the <b>Company</b> field and select the desired company name.</p> <p><i>The company name displayed in the header changes to the one selected.</i></p> <p><b>Note:</b> When the list of available companies display, you can use the search field displayed at the top of the list to search for a specific company name.</p>

## 2. My Profile

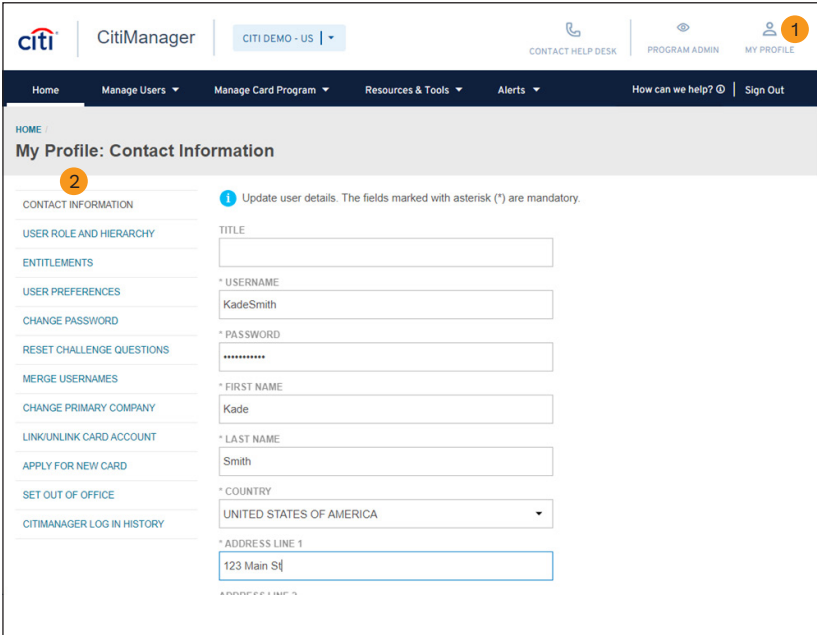
### My Profile Overview

#### Description

The **My Profile** screen is used to access links that are used to view your user role, hierarchy and entitlements. Additionally, you may update the following depending on your entitlements:

- CitiManager Site contact details
- User role and hierarchy information
- View entitlements
- User preferences such as language, date and time format and currency
- Change your password
- Reset challenge questions
- Merge CitiManager Site usernames if you have more than one
- Change your primary company if you are assigned more than one
- Link/Unlink another card account
- Apply for a new card
- Set an out-of-office backup
- CitiManager Site log in history

#### My Profile Screen — Navigation

Screen	Descriptions
 <p><b>My Profile Screen</b></p>	<ol style="list-style-type: none"> <li>1. Click the <b>My Profile</b> link on the far right-side of the header to access the <b>My Profile: Contact Information</b> screen and links used to view your profile information.</li> <li>2. From the <b>My Profile: Contact Information</b> screen, the links displayed on the left-side allow you to view and maintain your profile information such as role, hierarchy, entitlements and passwords.</li> </ol>



## Update Contact Information

### Key Concepts

There are times when it may be necessary to update the contact information associated with your CitiManager Site user profile. The following profile information can be updated:

- Title
- Username
- First name and last name
- Address
- Mobile phone number
- Phone number/contact number
- Fax number
- Work e-mail address
- Alternate e-mail address

To update the contact information and the address associated with your card/statement, refer to the **Perform Card Maintenance** topic in this User Guide.

### Step-by-Step Instructions

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen. <i>The Contact Information screen displays.</i>
2.	Update the necessary contact details associated with your CitiManager Site profile. <b>Note:</b> An asterisk (*) indicates a required field. A mobile phone number is required to receive a one-time passcode and alerts. If you choose not to provide a mobile phone number, you must select the opt-out checkbox that will display if this field is left blank.
3.	When you are finished, scroll to the bottom of the screen and click the <b>Save Changes</b> button. <i>A confirmation message displays indicating your profile has been successfully updated.</i>

## View Your User Role and Hierarchy

### Key Concepts

Each user is assigned a specific hierarchy which defines the information they can access in the CitiManager Site. Hierarchy numbers are seven digits long and there are up to eight levels of hierarchy, depending on how your company's reporting structure is defined at Citi. For Hierarchy Level 1, the leading two digits reference the bank and BIN number. For Hierarchy Levels 2-7, the leading two digits are 00.

Users are also assigned user roles which identify the functions a user can perform in CitiManager. In some instances, users are assigned more than one role in the CitiManager Site.

In the CitiManager Site the Cardholder, Non-cardholder (Program Administrator) and Supervisor roles are available. The Supervisor role is only used if you have that role in your online application workflow.

You can only view the roles and hierarchies you have been assigned. Any changes must be completed by another administrator.

### Step-by-Step Instructions

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen. <i>The Contact Information screen displays.</i>
2.	Click the <b>User Role and Hierarchy</b> link. <i>The User Role and Hierarchy screen displays. The roles and hierarchies you have been assigned display.</i>
3.	Click the <b>(+) plus sign</b> icon to expand the hierarchy tree as necessary. <i>The hierarchy tree expands.</i>

### View Entitlements

#### Key Concepts

CitiManager is an entitlement-based application. Entitlements define which features and functions users have access to in the CitiManager Site.

You can view the entitlements and tools assigned to you based on your role. Changes to your entitlements must be completed by another Non-cardholder.

Examples of entitlements that may be assigned to you include:

- Card maintenance
- Activate/deactivate users
- View authorizations
- Approve requests
- Pending user requests
- Update user
- Set alerts

### Step-by-Step Instructions

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen. <i>The Contact Information screen displays.</i>
2.	Click the <b>Entitlements</b> link. <i>The Entitlements screen displays. All the entitlements you have been assigned display.</i>

### Update User Preferences

#### Key Concepts

It is possible to update the following CitiManager Site user preferences:

- Helpdesk verification question and answer
- Preferred language (For correspondence)
- Hierarchy Sorting (Unit name or number)
- Date Format
- Time Format
- Time Zone
- Currency Format

The Helpdesk verification question/answer may be used to confirm your status with Citi when you call the Helpdesk for assistance. It is also used for self-service password resets and username retrieval.

### Step-by-Step Instructions

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen. <i>The Contact Information screen displays.</i>
2.	Click the <b>User Preferences</b> link. <i>The User Preferences screen displays.</i>
3.	Make any necessary changes to your user preferences. <b>Note:</b> An asterisk (*) indicates a required field.
4.	When you are finished, click the <b>Save Changes</b> button. <i>A confirmation message displays indicating your preferences have been updated successfully.</i>

## Change Your Password

### Key Concepts

CitiManager Site passwords for Non-cardholders remain active for 90 days. You will be prompted to change your password 15 days prior to the expiration date.

If you feel your password has been compromised or at any time you need to change your password, you can use the Change Password function from **My Profile**.

### Step-by-Step Instructions

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen. <i>The Contact Information screen displays.</i>
2.	Click the <b>Change Password</b> link. <i>The Change Password screen displays.</i>
3.	In the <b>Your Current Password</b> field, type your current password.
4.	In the <b>Create Your New Password</b> field, type your new password. <b>Note:</b> The password requirements display in a window as you type. A checkmark displays when each requirement is fulfilled.
5.	In the <b>Confirm Your New Password</b> field, re-type your new password.
6.	Click the <b>Change Password</b> button. <i>A confirmation message displays indicating your password has been changed.</i>

## Reset Challenge Questions

### Key Concepts

Since the CitiManager Site requires dual authentication you may need to answer an additional security question after you enter your username and password during the log in process.

You must select and answer three challenge questions when initially registering for the CitiManager Site and when you reset your existing challenge questions.

You may change your challenge questions and/or their answers at any time. Once you submit the request to reset your challenge questions, you will need to log in to the CitiManager Site and when prompted select and answer your new challenge questions.

### Step-by-Step Instructions

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen. <i>The Contact Information screen displays.</i>
2.	Click the <b>Reset Challenge Questions</b> link. <i>The Reset Challenge Questions screen displays prompting you to answer one of your existing challenge questions.</i>
3.	Type the answer to the existing challenge question displayed.
4.	Click the <b>Confirm</b> button. <i>A confirmation message displays at the top of the screen indicating your challenge questions have been reset. The next time you log in to the CitiManager Site, you will be prompted to select and answer three new challenge questions.</i>
5.	From the <b>CitiManager Site Login</b> screen, type your username and password and then click the <b>Sign In</b> button. <i>The challenge question screen displays.</i>
6.	Select your three challenge questions from the drop-down list and then type the answer for each. <b>Note:</b> You must select and answer three different questions. The answer for each question must be unique and have at least three characters. If you enter inaccurate information, click the <b>Clear</b> button before saving. <b>Note:</b> To confirm the challenge question answers, you will be asked to answer the questions twice during the set-up process.
7.	Click the <b>Save</b> button. <i>The CitiManager Site Home screen displays and your new challenge questions and answers become effective.</i>

## Merge Usernames

### Key Concepts

As a CitiManager Site user you may have more than one username based on your role or responsibilities. For example, you may have a Non-cardholder username and a Cardholder username. If this is the case, you can merge the Cardholder username with your Non-cardholder username, eliminating the need to log in separately to each account and manage each separately.

Be sure to merge any usernames for which you have fewer permissions into the one that has the most permissions. This will ensure that you have all the permissions you are entitled to under one username.

**Note:** If you are merging Cardholder and Non-cardholder accounts, be sure to merge the Cardholder username into the Non-Cardholder username otherwise you will not be able to access the Learning Center. Only Non-cardholders can access the Learning Center.

Before you merge your usernames, be sure you are logged in to the CitiManager Site using the username you wish to keep. This username will be kept as the primary username. After the merge is complete, the alternate username (the one being merged) will be deactivated.

You can only merge two usernames at a time. You must repeat the merge process to add additional accounts.

If you don't already have a card or are applying for a new card, refer to the **Apply for a Card** topic in this User Guide.

If you already have a card account but have not registered it in the CitiManager Site, you can link it to your existing CitiManager username without creating another login, username and password. Refer to the **Link a Card Account** topic in this User Guide.

### Step-by-Step Instructions

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen. <i>The Contact Information screen displays.</i>
2.	Click the <b>Merge Usernames</b> link. <i>The Merge Usernames screen displays.</i>
3.	Click the <b>Start Merge</b> button. <i>The Disclaimer screen displays.</i>
4.	Read the disclaimer information displayed and when finished click the <b>Continue</b> button. <i>The Login screen displays.</i> <b>Note:</b> By clicking the <b>Continue</b> button, you are acknowledging that you have read and understand the conditions for merging your usernames.
5.	In the <b>Alternate Username</b> field, type your alternate username.
6.	In the <b>Password</b> field, type the password for the alternate username.
7.	Click the <b>Continue</b> button. <i>The Challenge Question screen displays and you are prompted to answer one of the challenge questions associated with the alternate username you are merging.</i>
8.	In the challenge question field, type the answer to the challenge question.
9.	Click the <b>Complete</b> button. <i>You are logged out of system and returned to the CitiManager Log In screen.</i>
10.	Log back in to the CitiManager Site using the primary username and all of your permissions will be available from that username.

### Change Primary Company

#### Key Concepts

Each Level 1 Hierarchy entity is referred to as a separate company. As a Non-cardholder, you may have access to accounts in different companies if your organization has more than one. For example, you may manage multiple travel programs or a travel program and a purchase program.

When logging in to the CitiManager Site, your view defaults to one of those accounts which have been set as your primary company.

While you can toggle between companies using the drop-down list that displays in the header of the CitiManager Site, you can also change the default so when you log in to the CitiManager Site the preferred company displays by default.

You cannot change your primary company if only one company is assigned to you.

## Step-by-Step Instructions

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen. <i>The Contact Information screen displays.</i>
2.	Click the <b>Change Primary Company</b> link. <i>The Change Primary Company screen displays. A list of companies managed by you displays.</i>
3.	Select the radio button for the company you wish to set as your default.
4.	Click the <b>Save</b> button. <i>The default company is saved and a confirmation message displays at the top of the screen.</i>

## Link a Card Account

### Key Concepts

If you already have a card account but have not registered it in the CitiManager Site, you can link it to your existing CitiManager username without creating another login, username and password. You can only link your own account, not another Cardholder's.

If you don't already have a card or are applying for a new card, refer to the **Apply for Card** topic in this User Guide.

If you have more than one CitiManager username (for example, a Cardholder and Non-Cardholder username) and you would like to merge them so you don't have to login separately to each, refer to the **Merge Usernames** topic in this User Guide.

There are two possible registration options. The option used is based on your company's setup. You will use one of the following options:

- **Registration ID and Passcode** — If your company uses this option, Citi will send two e-mails once a transaction has posted to your account. You will receive one e-mail with your Registration ID and another with your Registration Passcode. These e-mails are required during the registration process. Once you receive your registration details, you must register within 60 days or your details will expire. You will be reminded every 15 days until your registration is complete.
- **Card Information** — Use the details from your card account. You will need your card number, account name and address. The account name, address and zip code must match what appears on your billing statement exactly.

Depending on your company's setup, these options may not display and the **Enter Your Card Information** screen automatically displays.

If you need to unlink an account, you must toggle to your Cardholder account and unlink it from **My Profile**. Refer to the **Unlink a Card Account** topic in this User Guide.

## Step-by-Step Instructions

### Link a Card Account Using a Registration ID and Passcode

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen. <i>The Contact Information screen displays.</i>
2.	Click the <b>Link/Unlink Card Account</b> link. <i>The Link Card Account screen displays.</i>
3.	Select the <b>Registration ID/Passcode</b> radio button and click the <b>Continue</b> button. <i>The Registration ID/Passcode screen displays.</i>

Step	Action
4.	In the <b>Registration ID</b> field, type the Registration ID sent in the e-mail sent from Citi.
5.	In the <b>Registration Passcode</b> field, type the Registration Passcode sent in the e-mail from Citi.
6.	Click the <b>Continue</b> button.  <i>A confirmation message and the Card Account screen displays. The card account you just linked is now listed.</i>

#### Link a Card Account Using Card Information

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen. <i>The Contact Information screen displays.</i>
2.	Click the <b>Link/Unlink Card Account</b> link. <i>The Enter Your Card Information screen displays.</i>
3.	Select the <b>Enter Your Card Information</b> radio button and click the <b>Continue</b> button. <i>The Enter Your Card Information screen displays.</i>
4.	From the <b>Card Details</b> section, in the <b>Card Number</b> field, type your card number exactly as it appears on your billing statement, no spaces or dashes.
5.	In the <b>Name on Card</b> field, type the account name exactly as it appears on your billing statement.
6.	In the <b>Contact Details</b> section, type the billing address for your card exactly as it appears on your billing statement. An asterisk (*) indicates a required field. <b>Note:</b> If your zip code is nine digits, then enter all nine digits. If your zip code is only five digits, then only enter five digits.
7.	Click the <b>Continue</b> button.  <i>A confirmation message and the Card Account screen display. The card account you just linked is now listed.</i>

#### Unlink a Card Account

##### Key Concepts

If you linked additional card accounts to your user profile, you can remove them when they have been closed, reported as lost-stolen and a new card has been issued.

You must unlink the card account from your Cardholder role.

If you have any issues unlinking a card account, contact the Helpdesk for assistance.

##### Step-by-Step Instructions

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen. <i>The Contact Information screen displays.</i>
2.	Click the <b>Link/Unlink Card Account</b> link.  <i>The Card Details screen displays.</i>

Step	Action
3.	Click the <b>Unlink Card Account</b> link.  <b>Note:</b> If you have more than one account linked, click the radio button for the account you wish to remove from your user profile. <i>The confirmation screen displays.</i>
4.	Verify you have selected the correct account and click the <b>Confirm</b> button. <i>A confirmation message displays at the top of the screen.</i>

## Apply for a New Card

### Key Concepts

Before you can apply for a new card for yourself, an Invitation Passcode and the Inviter's E-mail address are required. Both are obtained from your administrator.

You will receive a confirmation message when the necessary approvals have been received, either from a Supervisor and/or Non-cardholder.

Once your card application is approved, the account will be linked to your CitiManager Site username and password that were created during the application process.

Only use the **Apply for a New Card** procedure if you don't already have a card or are applying for a new card.

If you already have a card account but have not registered it in the CitiManager Site, you can link it to your existing CitiManager username without creating another login, username and password. Refer to the **Link a Card Account** topic in this User Guide.

If you have more than one CitiManager username (for example, a Cardholder and Non-Cardholder username) and you would like to merge them so you don't have to login separately to each, refer to the **Merge Usernames** topic in this User Guide.

### Step-by-Step Instructions

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen. <i>The Contact Information screen displays.</i>
2.	Click the <b>Apply for New Card</b> link. <i>The Apply for New Card screen displays.</i>
3.	Click the <b>Begin</b> button. <i>The Apply for New Card — Passcode Verification screen displays.</i>
4.	In the <b>Invitation Passcode</b> field, type the <b>Invitation Passcode</b> that was sent to you by your administrator.
5.	In the <b>Invitation E-mail Address</b> field, type the inviter's e-mail address that was sent to you by your administrator.
6.	Click the <b>Continue</b> button. <i>The Country screen displays.</i>
7.	Select the country of the currency where the card will be billed from the drop-down list. <b>Note:</b> The countries displayed from the drop-down list are based on your company's setup.
8.	Click the <b>Continue</b> button. <i>The card application form displays.</i>



Step	Action
9.	Complete the required fields on the application.  <b>Note:</b> If you are unable to complete the required fields, you can also save the application as a draft and return to it later. For individually billed accounts, a physical address is required for the primary address of the card. P.O. boxes are not allowed.
10.	Click the <b>Submit</b> button.  <i>A confirmation message displays at the top of the screen indicating the application has been submitted for processing.</i>

## Set/Remove Out of Office Backup

### Key Concepts

When you are scheduled to be out of the office for a period of time, it is possible to assign someone to act as your backup for a specified timeframe. When the out of office feature is turned on, all CitiManager Site generated e-mails, for example, application and maintenance requests, will be sent to the selected backup. When you no longer require a backup, you can remove them manually or they will be removed automatically after a specified date.

The backup you select must be a Non-cardholder and they must be assigned to your hierarchy at the same level or above. They must also have the entitlements to approve requests.

### Step-by-Step Instructions

Set an Out of Office Backup

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen.  <i>The Contact Information screen displays.</i>
2.	Click the <b>Set Out of Office</b> link.  <i>The Set Out of Office screen displays.</i>
3.	Click the <b>Select Backup</b> button.  <i>The Select Backup Program Administrator search screen displays.</i>  <b>Note:</b> If a backup was previously assigned, their information displays.
4.	To search for the person who you wish to assign as your backup, type your search criteria and click the <b>Search</b> button.  <b>Note:</b> You can search by <b>Last Name</b> , <b>First Name</b> or <b>Username</b> . To search for users in a specific hierarchy, click the <b>Lookup Hierarchy</b> link. If necessary, click the <b>(+) plus sign</b> icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the <b>Select</b> button.  <i>The search results display at the bottom of the screen.</i>
5.	From the <b>Full Name</b> column, click the link for the Non-cardholder you wish to assign as your backup.  <i>The Set Out of Office from/to date screen displays.</i>
6.	In the <b>From Date</b> and <b>To Date</b> fields, select the timeframe you wish to assign your backup and click the <b>Set Out of Office</b> button.  <b>Note:</b> The start date of the out of office cannot be set more than 90 days from today's date.  <i>The screen refreshes and the name of the backup assigned and the date range selected displays.</i>

## Remove Out of Office Backup

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen. <i>The Contact Information screen displays.</i>
2.	Click the <b>Set Out of Office</b> link. <i>The Backup PA Details screen displays the current out of office information.</i> <b>Note:</b> The information displayed includes the <b>Full Name</b> , <b>Hierarchy name</b> , <b>Role</b> and the <b>User Profile E-mails Address</b> of the backup and the date range that was set.
3.	Click the <b>Remove Current Out of Office</b> button. <i>The screen refreshes and a confirmation message displays at the top of the screen. The out of office assignment is removed.</i>

## View CitiManager Log In History

### Key Concepts

When you first log in to the CitiManager Site, a message at the top of the **Home** screen displays your login history. You can also view this information from the **CitiManager Log In History** screen.

### Step-by-Step Instructions

Step	Action
1.	From the header, click the <b>My Profile</b> icon that displays on the far right-side of the screen. <i>The Contact Information screen displays.</i>
2.	Click the <b>CitiManager Log In History</b> link that displays on the left-side of the screen. <i>The CitiManager Log In History screen displays your login history.</i>

## 3. Manage Users

### Perform a Search Overview

#### Key Concepts

You can search for users (Cardholders, Non-cardholders and Supervisors if used in your company's approval workflow) and view their account information. You only have access to those accounts within your span of control.

You can export your search results which can be downloaded in Comma Separated Value (CSV), Excel (XLS) or Portable Document Format (PDF) format.

You must enter search criteria in at least one text entry field. Blank searches are not allowed. The minimum requirements for a field will display once you start to type. The **First Name**, **Last Name** and **Username** fields are starts with searches and not contains.

Search criteria available from the default view includes:

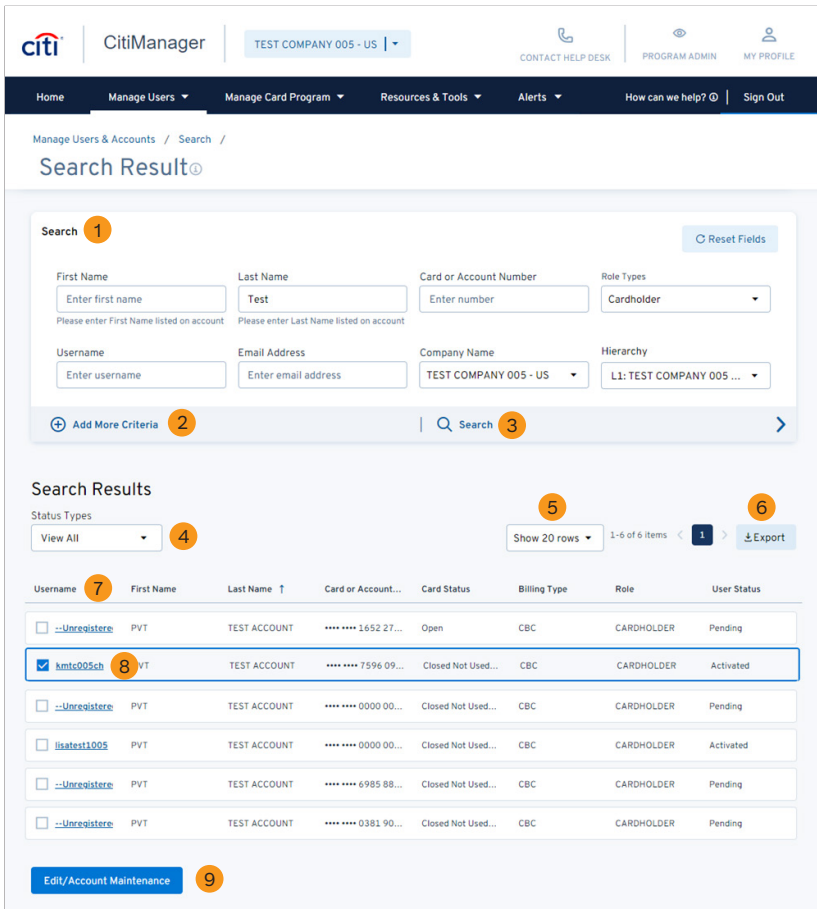
- First Name
- Last Name
- Card or Account Number
- Role Types
- Username
- Email Address
- Company Name
- Hierarchy

Search criteria available in the expanded view include:

- Employee ID
- Status Type
- Billing Type

For detailed steps to complete a Cardholder or Non-cardholder search, refer to the Search for Cardholder and View Cardholder Details or Search for Non-cardholder and View User Account Details topics in this User Guide.

## Search Screen Overview

Screen	Descriptions
 <p>The screenshot shows the CitiManager Search Results interface. It includes a top navigation bar with 'Home', 'Manage Users', 'Manage Card Program', 'Resources &amp; Tools', 'Alerts', 'How can we help?', and 'Sign Out'. The main content area is titled 'Search Result' and contains a search form with fields for First Name, Last Name, Card or Account Number, Role Types, Username, Email Address, Company Name, and Hierarchy. Below the form is a 'Search' button and a '+ Add More Criteria' link. The search results are displayed in a table with columns: Username, First Name, Last Name, Card or Account..., Card Status, Billing Type, Role, and User Status. A 'Status Types' dropdown is on the left, and a 'Show 20 rows' dropdown is on the right. An 'Export' button is in the top right of the results area. A table of results is shown, with one row selected. At the bottom, there is an 'Edit/Account Maintenance' button.</p>	<ol style="list-style-type: none"> <li>1. To narrow your search results, enter desired search criteria in the fields in the <b>Search</b> section at the top of the screen.</li> <li>2. To display additional search fields, click the <b>Add More Criteria</b> link. To remove the additional criteria from the display, click the <b>Remove Criteria</b> link.</li> <li>3. Click the <b>Search</b> link to display the search results.</li> <li>4. You can filter the results using the <b>Status Types</b> (e.g. Open, Closed, Pending) field.</li> <li>5. Use the show rows drop-down list to select the number of rows that display in the search results (20 – 100).</li> <li>6. To export your search results, position your mouse over the <b>Export</b> button and select the download option from this list displayed. Results can be downloaded in Comma Separated Value (CSV), Excel (XLS) or Portable Document Format (PDF) format.</li> <li>7. To sort the results by a column, click the column header name.</li> <li>8. Click the link from the <b>Username</b> column to display the details screen for the account.</li> <li>9. If you select an account using the checkbox, additional buttons may display at the bottom of the screen such <b>Edit/Account Maintenance</b> or <b>View User Details</b>. Only one account may be selected at a time.</li> </ol>

## Search for a Cardholder and View Cardholder Details

### Key Concepts

As a Program Administrator, you can search for Cardholders assigned to hierarchies within your span of control.

Once you complete a search you may click the link from the **Username** column to access the following information on the **Cardholder Details** screen:

- Balance, credit limit and payment information
- Recent transactions and previous statements
- Aging of balance information
- Card contact information

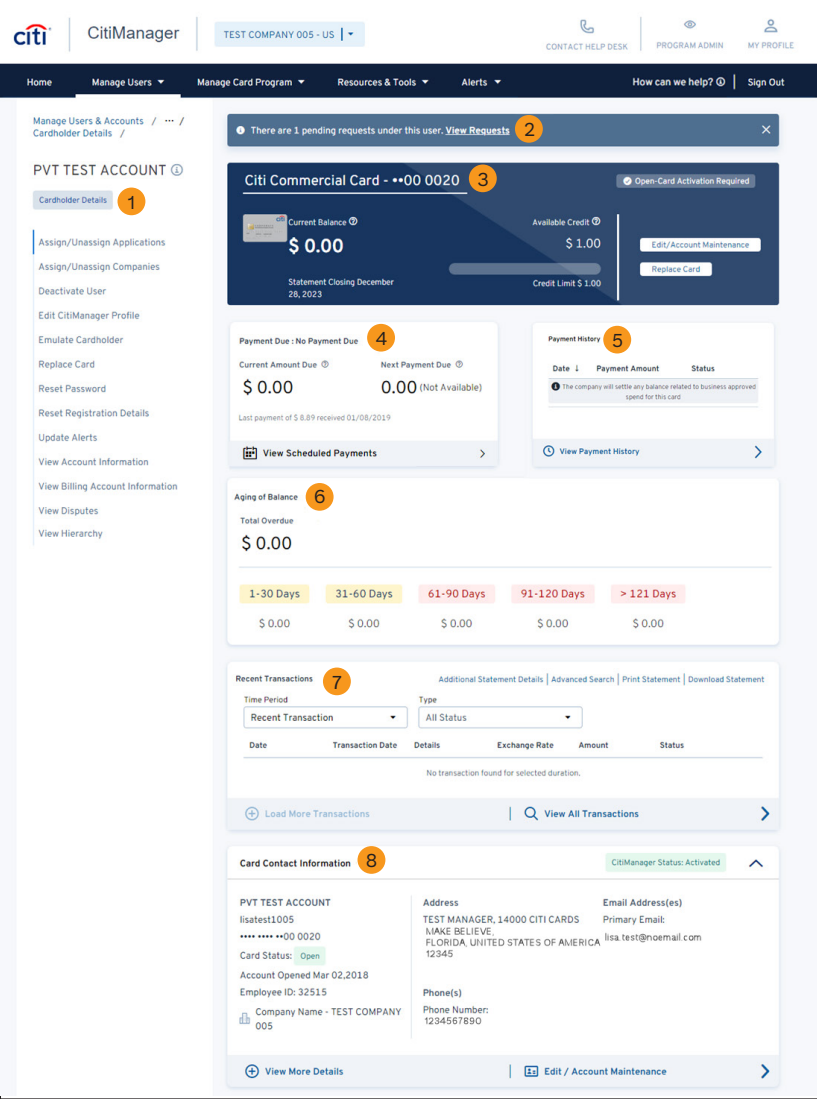
The **Cardholder Details** screen is also a launching point if you want to perform account maintenance or perform other actions such as assign/unassign applications or companies, emulate a cardholder, replace a card, reset a password, reset registration details, update alerts, view account information, initiate/view a dispute if it was initiated online in the CitiManager Site and view entitlements or the hierarchy. You can only emulate Cardholders or update alerts for Cardholders who have registered for the CitiManager Site and have a username.

### Step-by-Step Instructions

Search for Cardholder

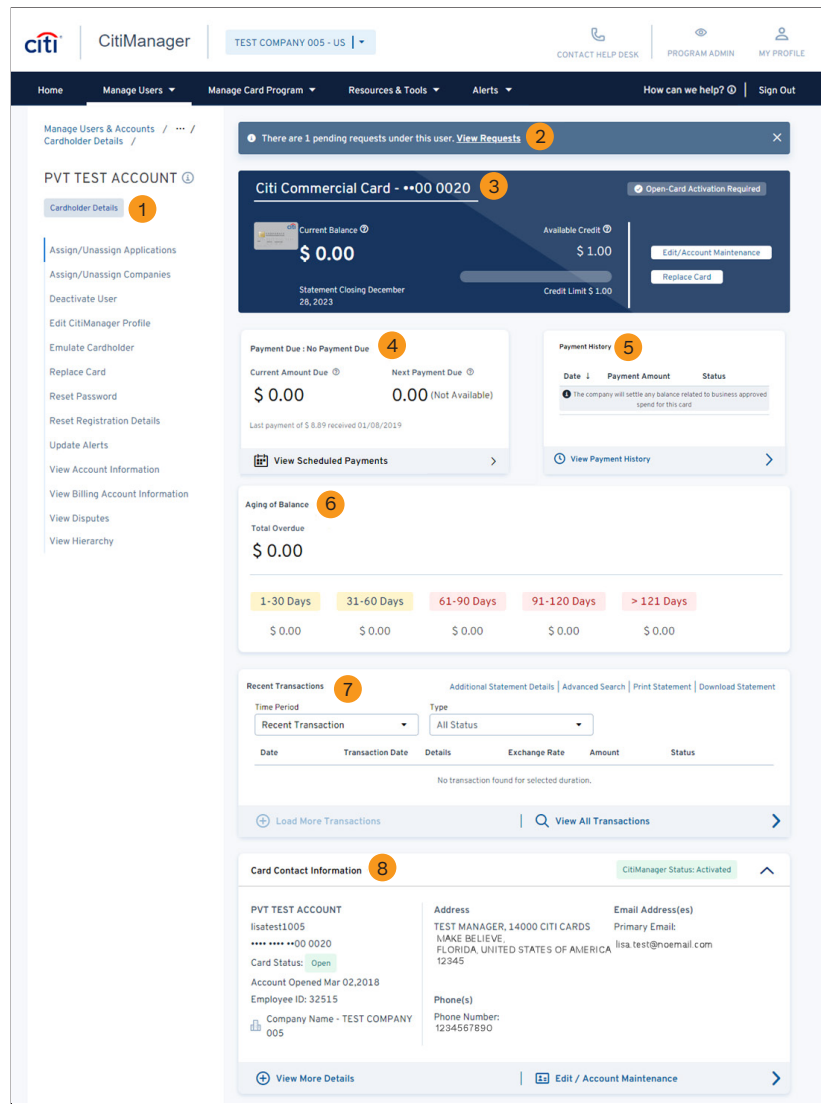
Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the card account you wish to view. <i>The Cardholder Details screen displays the card overview including the current balance, available credit, credit limit, payment history, aging of balance, recent transactions, previous statements, transaction details and card contact information.</i> <b>Note:</b> To perform a new search or return to your search results, from the breadcrumbs that display on top-left of the screen, position your mouse over the <b>ellipsis (...)</b> and click either <b>Search</b> or <b>Search Results</b> .

## Cardholder Details Screen Overview

Screen	Descriptions
	<ol style="list-style-type: none"> <li>Links displayed on the left-side of the screen can be used to perform additional actions on the card account. The links displayed are based on your entitlements and company set-up.</li> <li>If the account has pending application and maintenance requests or the Cardholder has not yet registered for the CitiManager Site, a message displays at the top of the screen and you can click the link to view the requests or resend the registration details.</li> <li>In the card information section, the card number, card status, the current balance, available credit, statement closing date and credit limit display. If you have additional card accounts, a drop-down arrow displays, and you can select another account to view. The account status displays in the top-right of the sections. You can click the <b>Edit/Account Maintenance</b> or <b>Replace Card</b> buttons to perform account maintenance or initiate a card replacement.</li> <li>In the <b>Payment Due</b> section, the current amount due, the next payment due and last payment received display. Click the <b>View Scheduled Payment</b> link to display any scheduled payment information such as amount, date, bank routing number, bank name, bank account number and type and the status of the payment.</li> <li>In the <b>Payment History</b> section, the date, payment amount and status of the payment display. Click the <b>View Payment History</b> link to display payment information such as amount, date, bank routing number, bank name, bank account number and type and the status of the payment. This section displays based on your company's set-up. You must also have the entitlements to make a payment and view payment history.</li> <li>In the <b>Aging of Balance</b> section, the total past due and days past due (1-120) display.</li> </ol>

### Cardholder Details Screen

## Screen



**Cardholder Details** 1

Manage Users & Accounts / ... / Cardholder Details

**PVT TEST ACCOUNT** 2

There are 1 pending requests under this user. [View Requests](#)

**Citi Commercial Card - \*\*00 0020** 3

Current Balance \$ 0.00 Available Credit \$ 1.00

Statement Closing December 28, 2023 Credit Limit \$ 1.00

Payment Due: No Payment Due 4

Current Amount Due \$ 0.00 Next Payment Due 0.00 (Not Available)

Last payment of \$ 8.89 received 01/08/2019

Payment History 5

Date | Payment Amount | Status

The company will settle any balance related to business approved spend for this card.

Aging of Balance 6

Total Overdue \$ 0.00

1-30 Days 31-60 Days 61-90 Days 91-120 Days > 121 Days

\$ 0.00 \$ 0.00 \$ 0.00 \$ 0.00 \$ 0.00

Recent Transactions 7

Time Period: Recent Transaction Type: All Status

Date	Transaction Date	Details	Exchange Rate	Amount	Status
No transaction found for selected duration.					

Load More Transactions | View All Transactions

**Card Contact Information** 8

CitiManager Status: Activated

PVT TEST ACCOUNT  
lisatest1005  
\*\*\*\* \*\*00 0020  
Card Status: Open  
Account Opened Mar 02, 2018  
Employee ID: 32515  
Company Name - TEST COMPANY 005

Address  
TEST MANAGER, 14000 CITI CARDS  
MAKE BELIEVE,  
FLORIDA, UNITED STATES OF AMERICA  
12345

Email Address(es)  
Primary Email:  
lisa.test@noemail.com

Phone(s)  
Phone Number:  
1234567890

View More Details | Edit / Account Maintenance

Cardholder Details Screen

## Descriptions

- In the **Recent Transactions/Statements** section, you can view recent or billed transactions. You can select a statement date from the **Time Period** drop-down list. You can also click the links on the top-right of the section to view additional statement details, perform an advanced search, print a statement or download a statement. From the bottom of the section, you can click the **Load More Transactions** link to display additional transactions. Ten transactions display by default and ten additional will display if you load more transactions. You can click the **View All Transaction** link to view all transactions or search for a transaction.
- The **Card Contact Information** section displays the account name, the address and contact information, the account status and company name. From the bottom of the section, you can click the **View More Details** link to display additional contact information or click the **Edit/Account Maintenance** link to perform account maintenance.

## Search for Non-cardholders and View User Account Information

### Key Concepts

You can search for a Non-cardholder and view their user account information. Once the search is complete, you may view account information including their:

- CitiManager Status
- Company Name
- Address
- E-mail Address
- Phone Number
- Role
- Entitlements

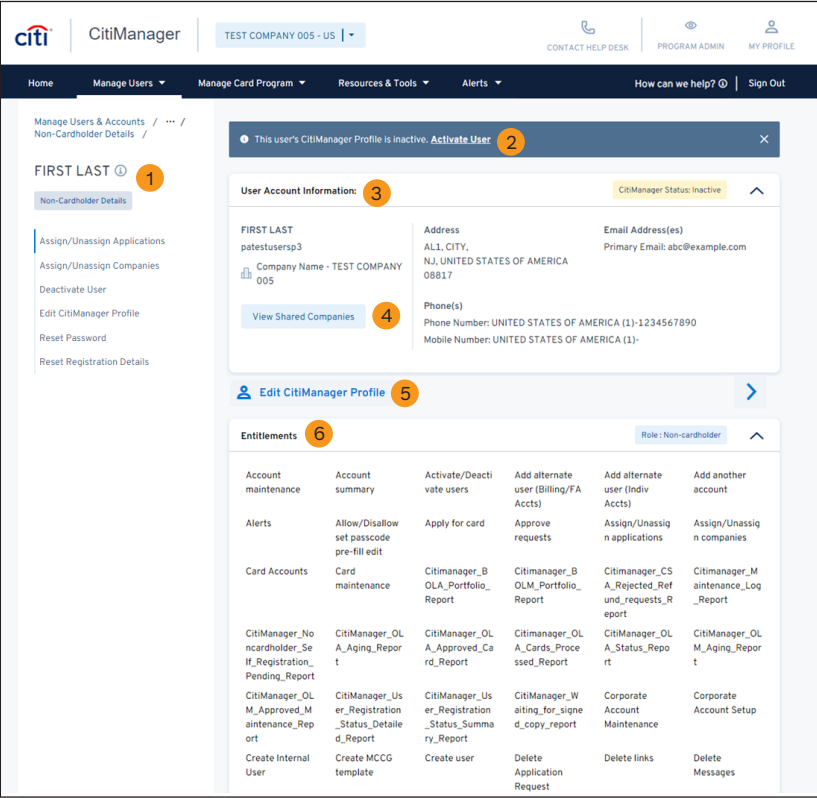
### Step-by-Step Instructions

Search for Non-cardholder

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options. To sort the results by the Non-cardholder role, select <b>Non-cardholder</b> from the <b>Role Types</b> drop-down list.
3.	From the <b>Username</b> column, click the link for the Non-cardholder you wish to view. <i>The Non-Cardholders Details – User Account Information screen displays the user status, name, company, address, e-mail address, phone number, role, and entitlements.</i> <b>Note:</b> To perform a new search or return to your search results, from the breadcrumbs that display on top-left of the screen, position your mouse over the <b>ellipsis (...)</b> and click either <b>Search</b> or <b>Search Results</b> .
4.	You can also navigate to the following based on the account status and your company's set-up: <ul style="list-style-type: none"> <li>• Use the links on the left-side of the screen to assign/unassign application, assign/unassign companies, activate/deactivate a user, end the user's CitiManager Site profile, reset their password or registration details.</li> <li>• If the Non-cardholder is not currently active in the CitiManager site, click the <b>Activate User</b> link if you wish to activate them. Refer to the Activate/Deactivate User topic in this User Guide for additional information.</li> <li>• To view companies you share with the Non-cardholder, click the <b>View Shared Companies</b> link.</li> <li>• To edit a user's profile, including personal details, contact details, roles, hierarchy and entitlements, click the <b>Edit CitiManager Profile</b> link. Refer to the <b>Edit a User's CitiManager Profile (Update User)</b> topic in this User Guide for additional information.</li> </ul>



## Non-Cardholder Details Screen Overview

Screen	Descriptions
 <p><b>Non-cardholder Details Screen</b></p>	<ol style="list-style-type: none"> <li>Links displayed on the left-side of the screen can be used to perform additional actions on the account.</li> <li>A message and links will display at the top of the screen if the account has been inactivated or if the user has not registered in the CitiManager Site. If the account has been inactivated, you can click the <b>Activate User</b> link to activate the user. If the user has not registered in the CitiManager Site, the <b>Resend Registration Details</b> link displays.</li> <li>In the <b>User Account Information</b> section, the account status, account name, company, address and contact information display.</li> <li>To view the companies you have in common with the Non-cardholder being viewed, click the <b>View Shared Companies</b> button.</li> <li>To edit the user's CitiManager profile, including personal details, contact details, roles, hierarchy, and entitlements, click the <b>Edit CitiManager Profile</b> link.</li> <li>In the <b>Entitlements</b> section, the entitlements and role assigned to the Non-cardholder display.</li> </ol>

## View and Download Recent Transactions

### Key Concepts

Recent unbilled transactions are transactions that have posted to an account but have not yet billed to a statement. The recent transactions that display will appear on the next statement. The recent activity displayed is not considered a final statement.

The **Recent Activity/Statements** section of the **Cardholder Details** screen displays the posting date, transaction date, transaction details, exchange rate, amount and status of recent transactions. You can expand each transaction to view additional detail that may have been sent to Citi from a merchant. Transaction detail includes the original currency amount, currency exchange rate and the conversion amount that was posted and may include items such as airline name, ticket and flight number. Additionally, you can initiate a dispute if the transaction meets the requirements. Refer to the **Dispute a Transaction** topic in this User Guide for additional information.

You can also perform an advanced search of recent transactions by status type, a specific date, a date range, description or amount.

You can download and print recent transactions for individually or centrally billed accounts. If you wish to print recent transactions, it's recommended you download the transactions in Excel format. After you open the downloaded file, you can print it by selecting **Print** from the **File** menu.

## Step-By-Step Instructions

Step	Action
1.	<p>From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link.</p> <p><i>The Search screen displays.</i></p>
2.	<p>To perform a search, type the desired search criteria and click the <b>Search</b> link.</p> <p><b>Note:</b> To search by <b>Employee ID</b>, <b>Status Type</b> or <b>Billing Type</b>, click the <b>Add More Criteria</b> link.</p> <p><i>The search results display at the bottom of the screen.</i></p> <p><b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> and field to select/deselect sort options.</p>
3.	<p>From the <b>Username</b> column, click the link for the Cardholder account you wish to view.</p> <p><i>The Cardholder Details screen displays.</i></p>
4.	<p>From the <b>Recent Transactions/Statements</b> section, verify that <b>Recent Transactions</b> displays in the <b>Time Period</b> field. Ten transactions display by default. The transaction post date, transaction date, transaction details, exchange rate, transaction amount and status display.</p> <ul style="list-style-type: none"> <li>To view ten additional transactions on the <b>Cardholder Details</b> screen, click the <b>Load More Transactions</b> link. To view all transactions, click the <b>View All Transactions</b> link.</li> <li>To expand a transaction and view additional information, click the arrow link on the right-side of the transaction.</li> <li>To view authorizations/declines, view the transaction status in the <b>Status</b> column (Posted, Pending, Declined, Diverted). To view additional information about a transaction and a decline reason, click the arrow link on the right-side of the transaction to expand it. Once the transaction is expanded, you can also click the <b>View More Details</b> button.</li> <li>To view a snapshot of additional account details, credit limits, balance and payment details, click the <b>Additional Statement Details</b> link.</li> <li>To perform an advanced search, click the <b>Advanced Search</b> link. From the <b>Advanced Search</b> screen, you can filter by status type, or a date range or search by a date, description or amount.</li> </ul> <p><b>Note:</b> By default, the <b>Time Period</b> and <b>Search</b> fields are not available for input. To activate the fields, click the <b>Hide Advanced Search</b> link. To filter by <b>Date Range</b> or <b>Amount Range</b>, click the <b>Advanced Search</b> link to display these field.</p> <ul style="list-style-type: none"> <li>To download recent transactions in either Comma Separated Value (CSV) or Excel (EXL) format, click the <b>Download Statement</b> link and select the desired option. Excel is the default and recommended option if you intend to print the transactions. To print, you can open downloaded file and select <b>Print</b> from the <b>File</b> menu. You can also print a screen capture of recent transactions by clicking the <b>Print Statement</b> link and when the <b>Statement</b> screen displays, click the <b>Print</b> button.</li> <li>To initiate a dispute online, either select the checkbox for the transaction(s) and then click the <b>Dispute Charges</b> link or when the transactions is expanded, click the <b>Dispute Transaction</b> button. Refer to the <b>Dispute a Transaction</b> topic in this User Guide for additional information.</li> <li>To view/attach/delete transaction documents, click the arrow link on the right-side of the transaction to expand it and then click the <b>Upload Receipt File</b> button. For additional information about attaching transaction documents, refer to the <b>View/Upload/Delete Attachments</b> topic in this User Guide.</li> </ul>

## View and Download Statements

### Key Concepts

You can view a Cardholder's current statement or a statement from previous months. Transaction data will be retained for the previous 72 statements. Statements that are three years or older are archived and a request needs to be submitted in the CitiManager Site from the statement to download them.

The **Recent Activity/Statements** section of the **Cardholder Details** screen displays the posting date, transaction date, transaction details, exchange rate, amount and status of recent transactions. You can expand each transaction to view additional detail that may have been sent to Citi from a merchant. Transaction detail includes the original currency amount, currency exchange rate and the conversion amount that was posted and may include items such as airline name, ticket and flight number. Additionally, you can initiate a dispute if the transaction meets the requirements. Refer to the **Dispute a Transaction** topic in this User Guide for additional information.

You can also perform an advanced search of billed transactions by status type, a specific date, a date range, description or amount.

You can download and print transactions for individually or centrally billed accounts. If you wish to print recent transactions, it's recommended you download the transactions in Excel format. After you open the downloaded file, you can print it by selecting **Print** from the **File** menu.

### Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the Cardholder account you wish to view. <i>The Cardholder Details screen displays.</i>

Step	Action
4.	<p>From the <b>Recent Transactions/Statements</b> section, select the statement date from the <b>Time Period</b> drop-down list. Ten transactions display by default. The transaction post date, transaction date, transaction details, exchange rate, transaction amount and status display.</p> <ul style="list-style-type: none"> <li>To view ten additional transactions on the <b>Cardholder Details</b> screen, click the <b>Load More Transactions</b> link. To view all transactions, click the <b>View All Transactions</b> link.</li> <li>To expand the transaction and view additional transaction information, click the arrow link on the right-side of the transaction.</li> <li>To view authorizations/declines, view the transaction status in the <b>Status</b> column (Posted, Pending, Declined, Diverted). To view additional information about a transaction and a decline reason, click the arrow link on the right-side of the transaction to expand it. Once the transaction is expanded, you can also click the <b>View More Details</b> button.</li> <li>To view a snapshot of additional account details, credit limits, balance and payment details, click the <b>Additional Statement Details</b> link.</li> <li>To perform an advanced search, click the <b>Advanced Search</b> link. From the <b>Advanced Search</b> screen, you can filter by status type, or a date range or search by a date, description or amount.</li> </ul> <p><b>Note:</b> By default, the <b>Time Period</b> and <b>Search</b> fields are not available for input. To activate the fields, click the <b>Hide Advanced Search</b> link. To filter by <b>Date Range</b> or <b>Amount Range</b>, click the <b>Advanced Search</b> link to display these fields.</p> <ul style="list-style-type: none"> <li>To download statements in either Comma Separated Value (CSV), Portable Document Format (PDF) or Excel (EXL) format, click the <b>Download Statement</b> link and select the desired option. If you intend to print the statement, PDF is the recommended format. To print, you can open the downloaded file and select <b>Print</b> from the <b>File</b> menu.</li> </ul> <p><b>Note:</b> A request needs to be submitted to download statements that are three years or older. When you click on the statement date icon, a download request window displays. Click <b>Yes</b>, to confirm the request. After 24 hours, return to the Cardholder Details screen and click the statement date icon for the statement you downloaded to access the <b>View Archived Statements</b> screen. Click the <b>Download</b> link to download the statement to your computer.</p> <ul style="list-style-type: none"> <li>To initiate a dispute online, either select the checkbox for the transaction(s) and then click the <b>Dispute Charges</b> link or when the transactions is expanded, click the <b>Dispute Transaction</b> button. Refer to the <b>Dispute a Transaction</b> topic in this User Guide for additional information.</li> <li>To view/attach/delete transaction documents, click the arrow link on the right-side of the transaction to expand it and then click the <b>Upload Receipt File</b> button. For additional information about attaching transaction documents, refer to the <b>View/Upload/Delete Attachments</b> topic in this User Guide.</li> </ul>

## View/Upload/Delete Transaction Attachments

### Key Concepts

It's possible to view documents that have been attached to a transaction such as receipts. You can also upload or delete attachments.

A maximum of five attachments may be added to a transaction. Each file must be 5MB or less. You can upload on the most recent statement and the previous two statements.

The following file types are supported:

- .jpg
- .jpeg
- .png
- .pdf

### Step-By-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the desired column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the card account you wish to view. <i>The Cardholder Details screen displays.</i>
4.	From the <b>Recent Transactions/Statement</b> section, select the statement date from the <b>Time Period</b> drop-down list. You can choose to view recent transactions or billed transactions on a particular statement date. <b>Note:</b> To search for a specific transaction amount, date or description or perform an advanced search, click the <b>Advanced Search</b> link. By default, the <b>Time Period</b> and <b>Search</b> fields are not available for input. To activate the fields, click the <b>Hide Advanced Search</b> link. To filter by <b>Date Range</b> or <b>Amount Range</b> , click the <b>Advanced Search</b> link to display these fields.
5.	To a view, upload or delete an attachment for a transaction, click the arrow link that displays on the right-side of the transaction you wish to expand. <i>The row expands and additional transaction information displays.</i>
6.	From the expanded row, click the <b>Upload Receipt File</b> button. <i>The Attachments screen displays.</i>
7.	Select the <b>Attach</b> radio button.
8.	Click the <b>Submit</b> button.

Step	Action
9.	<p>To upload an attachment:</p> <ol style="list-style-type: none"> <li>From the <b>Actions</b> column, click the <b>Upload</b> link.  <b>Note:</b> If there are already five attachments, you will not be able to upload an additional one unless an existing one is deleted first.  <i>The upload window displays.</i></li> <li>Click the <b>Choose File</b> button and navigate to the desired document.</li> <li>Select the document file and click the <b>Upload</b> button.  <i>The file is uploaded and displays in the Attachments list.</i></li> </ol> <p>To view an attachment:</p> <ol style="list-style-type: none"> <li>From the <b>File Name</b> column, click the link for the attachment you wish to open.  <i>The attachment opens.</i></li> </ol> <p>To delete an attachment:</p> <ol style="list-style-type: none"> <li>From the <b>Actions</b> column, click the <b>Delete</b> link for the attachment you wish to delete.  <i>A confirmation message displays.</i></li> <li>Click the <b>OK</b> button.  <i>The attachment is deleted.</i></li> </ol> <p>To delete an attachment:</p> <ol style="list-style-type: none"> <li>From the <b>Actions</b> column, click the <b>Delete</b> link for the attachment you wish to delete.  <i>A confirmation message displays confirming you want to delete the attachment.</i></li> <li>Click the <b>Delete</b> button.  <i>A confirmation message displays.</i></li> </ol> <p>To view the Deleted File Log:</p> <ol style="list-style-type: none"> <li>Click the <b>Deleted File Log</b> link that displays at the bottom of the screen.  <i>The log opens displaying the name of the attachments deleted, the date they were deleted and who deleted them.</i></li> </ol>

## Dispute a Transaction

### Key Concepts

It's possible to dispute a transaction online in the CitiManager Site if you are unable to resolve a dispute directly with the merchant. For example, you can dispute a transaction when:

- The amount billed is incorrect
- The transaction is not recognized
- There are duplicate charges
- Goods were never received
- There was a hotel or airline cancellation
- Merchandise was defective
- A refund was not received for a returned item
- There was fraud
- The transaction was paid by other means, usually cash or another card

Citi recommends contacting the merchant first using the information from the receipt as it's generally faster to resolve a dispute directly with the merchant.

To meet the processing window of the networks (MasterCard and Visa) and to ensure time for the initiation of the dispute process, disputes must be submitted within 90 calendar days from the transaction date. However, to initiate a dispute online in the CitiManager Site, the dispute must be initiated within 60 days of the statement date on which the transaction appears. After 60 days, the dispute needs to be called in to Citi if it is still within the 90-day window. The CitiManager Site loads posted transactions daily and each transaction is available to review on the CitiManager Mobile Application. Citi recommends Cardholders enable transaction alerts and review the transactions that occur daily. Should a transaction need to be disputed, please initiate the dispute as soon as possible.

You can dispute single or multiple transactions at a time. When disputing multiple transactions, the dispute reason must be the same for all the transactions selected. If some of the transactions selected are not eligible to dispute, a message displays the ineligible reference numbers and the eligible disputes will be processed. You can dispute a maximum of ten disputes at a time.

You may be required to fax or mail additional information based on the dispute reason selected.

### Step-By-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the search results by a column, click the desired column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the card account you wish to view. <i>The Cardholder Details screen displays.</i>
4.	From the <b>Recent Transactions/Statements</b> section, select the statement date from the <b>Time Period</b> drop-down list. <i>Ten transactions display by default. The transaction post date, transaction date, transaction details, exchange rate, transaction amount and status display.</i> <b>Note:</b> To view ten additional transactions on the <b>Cardholder Details</b> screen, click the <b>Load More Transactions</b> link. To view all transactions, click the <b>View All Transactions</b> link.
5.	To initiate a dispute online, either select the checkbox for the transaction(s) and then click the <b>Dispute Charges</b> link or when the transactions is expanded, click the <b>Dispute Transaction</b> button. <b>Note:</b> A maximum of ten transactions can be disputed at a time. When disputing multiple transactions, the dispute reason must be the same for all the transactions selected. <i>The Transaction Dispute – Initiate Disputes screen displays. If any of the transactions selected do not fulfill the dispute rules, a message displays listing the ineligible transactions. Click the OK button to process the remaining transactions.</i>
6.	Click the <b>Continue Dispute</b> button. <b>Note:</b> The transaction details for up to three transactions display on the right-side of the screen. If you selected more than three transactions and want to view the details, click the <b>View Transaction Details</b> button. <i>The Transaction Dispute – Questions screen displays.</i>
7.	Select the dispute reason from the available options and click the <b>Continue</b> button. <b>Note:</b> You must select a dispute reason to continue. Only one reason can be selected. Click the reason name to view a description. <i>The Transaction Dispute – Questions screen displays.</i>

Step	Action
8.	Answer the question(s) and complete any fields requesting additional information that display based on the reason selected.
9.	When you are finished, click the verification checkbox to certify the information provided is accurate and then click the <b>Continue</b> button. <i>The Transaction Dispute – Review screen displays.</i>
10.	Review the dispute details, reason code and additional information and if correct, click the <b>Submit Dispute</b> button. If not, click the <b>Back</b> button. <i>The Dispute Transactions – Confirmation screen displays indicating if the dispute was successfully initiated.</i>
11.	If the dispute reason you selected indicated a requirement to fax or mail additional dispute information, click the <b>Download Dispute</b> form button and follow the instructions on the form.  <b>Note:</b> To return to the Cardholder Details/Statement screen, click the <b>Return to Statement/Recent Transactions</b> link. If the dispute reason was <b>Fraud</b> , your card will be closed. Click the <b>Contact Customer Service</b> button to request a replacement card.

## View Authorizations/Declines

### Key Concepts

You can view the previous ten days of authorization and decline information in real-time for card accounts that reside in your hierarchies. You can view the authorization date, detail, Merchant Category Code (MCC), transaction amount and status.

For declines you can also view the **Additional Information** screen, which displays the merchant name and the decline reason code and description.

### Step-By-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To narrow your search, type the desired search criteria and click the <b>Search</b> link.  <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i>  <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the card account you wish to view. <i>The Cardholder Details screen displays.</i>
4.	From the <b>Recent Transactions/Statements</b> section, view status of the transaction in the <b>Status</b> column (Posted, Pending, Declined and Diverted). To view additional information about a transaction and a decline reason, click the arrow link on the right-side of the transaction to expand it. Once the transaction is expanded, you can also click the <b>View More Details</b> button.



## Perform Account Maintenance

### Key Concepts

Account Maintenance allows Non-cardholders to update Cardholder account information such as card address, address, Employee ID, credit limit, temporary spend controls, account status and Merchant Category Code Groups (MCCGs).

You can close an account by selecting the appropriate account status from the **Spending Control** or **Cardholder-Demographics** section based on your company setup.

For individuality billed accounts, a Non-cardholder is not permitted to perform account maintenance on their own account.

### Step-By-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the card account you wish to maintain. <b>Note:</b> You can also select the checkbox for the account and then scroll down to the bottom of the screen and click the <b>Edit/Account Maintenance</b> button. If you choose this option, continue to Step 5. <i>The Cardholder Details screen displays.</i>
4.	Click the <b>Edit/Account Maintenance</b> button from the <b>Current Balance</b> section of the screen. <i>The Account Maintenance screen displays.</i>

Step	Action																								
5.	<p>Complete the necessary updates to all sections of the form.</p> <p>The <b>Temporary Cash Advance Percentage Start Date</b>, <b>Temporary Credit Limit Start Date</b>, and <b>Temporary Single Purchase Limit Start Date</b> fields are processed real-time except weekends and on Thanksgiving, Christmas and New Year’s.</p> <p>To add/remove an MCCG, click the <b>Add/RemoveMCCgroups</b> link. Select or deselect the checkbox(es) for the desired MCCGs. If you are adding and deleting MCCGs to an account, you must perform the additions prior to submitting the deletions. To edit an MCCG, click the <b>Edit</b> link and make any necessary changes. To update the single purchase limit, from the <b>Single Purchase Limit for MCCG</b> field, enter the new limit. When you are finished, click the <b>Update</b> button and then the <b>Back to Form</b> link.</p> <p>To close an account, from either the <b>Spending Controls</b> or <b>Cardholder-Demographics</b> section (based on your company setup), select the <b>Closed</b> status from the <b>Account Status</b> drop-down list. Accounts can only be re-opened within eighteen months. After that, a new applications must be submitted. The <b>Closed Temporary Block</b> status is equivalent to <b>Deactivate</b>. The only closed status that cannot be reopened in the CitiManager Site is <b>Closed Deceased</b>. Examples of closed status options include:</p> <table><tr><th>Account Status in CitiManager</th><th>Account Status Code</th><th>Account Reason Code</th></tr><tr><td>Closed</td><td>CL</td><td>V9</td></tr><tr><td>Closed Deceased</td><td>CL</td><td>DC</td></tr><tr><td>Closed Not Used/Inactivity</td><td>CL</td><td>DU</td></tr><tr><td>Closed Misuse</td><td>CL</td><td>V4</td></tr><tr><td>Closed Temporary Block</td><td>CL</td><td>V3</td></tr><tr><td>Closed No Longer Employed</td><td>CL</td><td>TE</td></tr><tr><td>Closed Too Many Cards/Duplicate</td><td>CL</td><td>TC</td></tr></table> <p>If you need to add comments to explain the reasons for account changes, enter them in the <b>Account Comments</b> field on the maintenance form. You can enter a maximum of 500 characters in the field. You can view previous comments by clicking the <b>View History</b> button.</p> <p>You may initiate a card replacement in the CitiManager Site when a card has been lost, stolen, never received or damaged. Refer to the Replace Lost/Stolen/Never Received/Damaged Card topic in the User Guide for additional information.</p>	Account Status in CitiManager	Account Status Code	Account Reason Code	Closed	CL	V9	Closed Deceased	CL	DC	Closed Not Used/Inactivity	CL	DU	Closed Misuse	CL	V4	Closed Temporary Block	CL	V3	Closed No Longer Employed	CL	TE	Closed Too Many Cards/Duplicate	CL	TC
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Closed Temporary Block	CL	V3																							
Closed No Longer Employed	CL	TE																							
Closed Too Many Cards/Duplicate	CL	TC																							
6.	<p>When you are finished, click the <b>Submit</b> button.</p> <p><i>A confirmation message displays based on the maintenance performed.</i></p>																								

## Manage Application and Maintenance Requests (View Requests)

### Key Concepts

You can search for and view all online application and maintenance requests submitted through the CitiManager Site. Non-cardholders can approve or reject the user requests as well as print requests, view the audit log and add comments to a request. It's recommended that you check requests on a regular basis to ensure they are being processed.

From the **View Request** screen you can also:

- View the Audit Log
- Override an approval
- Delete an application request
- Download applications
- View account documents

The option to approve and reject a request depends on the workflow and the status of the selected request.

To delete an online application request, a Non-cardholder must have that entitlement assigned to them.

The **Delete Application Request** link is only enabled when the **Select Request Type** is **Individual online application** and the application status is not **Processed** or **Approved**.

Common request statuses include the following:

Request Status	Description
Approved	Request was approved by the Non-cardholder and will be processed by Citi.
Draft	Request was saved but not submitted.
More Information Requested	Request was sent back by the approver requesting additional information.
Pending Final Review by Citi	Request was placed in queue for CAS to process (e.g. when two applications were submitted with the same social security number). This status is not updated in the CitiManager Site. Contact your CAS for the current status of the request.
Rejected by the Processor	Request was rejected by the backend processor. Contact your CAS who will identify and correct the issue.
Processed	Request was processed and a card will be issued.
Waiting for Approval	Online Card Application request is awaiting Non-cardholder approval.
Waiting for Signed Copy	Request has been approved but the country regulations require the applicant to sign a physical copy of the application and forward it to Citigroup Global Services Limited (CGSL).
Waiting for Supervisor Approval	Request is awaiting Supervisor approval.
Expired	Request was not handled within a predefined time period.

## Step-By-Step Instructions

### View/Approve/Reject a Request

Step	Action
1.	<p>From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>View Requests</b> link.</p> <p><b>Note:</b> You can also access requests by clicking the <b>Request ID</b> link from the <b>Application Request</b> and <b>Maintenance Request</b> sections of the <b>Home</b> screen. Applications will only display on the <b>Home</b> screen if they are waiting for approval.</p>
2.	<p>To perform a search, type the desired search criteria and click the <b>Search</b> button.</p> <p>To search for users at a specific hierarchy level, click the <b>Lookup Hierarchy</b> link. If necessary, click the <b>(+) plus sign</b> icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the <b>Select</b> button.</p> <p><i>The search results display at the bottom of the screen I maximum of 1,200 records can be returned.</i></p> <p><b>Note:</b> To sort the results by the <b>Request ID</b>, <b>Name</b>, <b>Status</b>, <b>Request Type</b> or <b>Last Modified Date</b> columns, click the column header name.</p>
3.	<p>To further filter the requests by type or status, select the desired checkbox(es) in the <b>Refine by Request Type</b> or <b>Refine by Status</b> sections displayed on the left-side of the screen.</p> <p><b>Note:</b> De-select the <b>All</b> checkboxes first to activate the sort option checkboxes.</p> <p><i>The requests displayed are filtered by the options selected.</i></p>
4.	<p>To view a request, from the <b>Request ID</b> column, click the link for the request you wish to view.</p> <p><i>The View Request screen displays.</i></p>
5.	Review the request details.
6.	<p>When you are finished reviewing the request, select either the <b>Approve</b> or <b>Reject</b> radio button.</p> <p><b>Note:</b> If request is rejected, you are required to type a reason for the rejection in <b>Comments</b> field and then click the <b>Save comment</b> link. By default, the <b>Allow for Resubmit</b> checkbox is selected. De-select the checkbox if resubmission is not allowed.</p>
7.	<p>When you are finished, click the <b>Submit</b> button.</p> <p><i>A confirmation message displays.</i></p>

### View the Maintenance Audit Log

Step	Action
1.	<p>From the <b>View Request</b> screen, click the <b>View Audit</b> link displayed on the right-side of the screen.</p> <p><b>Note:</b> To navigate to the <b>View Request</b> screen, refer to Steps 1-4 of the <b>View/Approve/Reject a Request</b> topic.</p> <p><i>The View Audit screen displays the date and time of the change, who made the change, which field was changed, the old value and the new value.</i></p>
2.	To navigate back to the request, click the <b>Back</b> button.

## Download Applications

Step	Action
1.	<p>From the <b>View Request</b> screen, click the <b>Download</b> link displayed on the right-side of the screen.</p> <p><b>Note:</b> To navigate to the <b>View Request</b> screen, refer to Steps 1–4 of the <b>View/Approve/Reject a Request</b> topic.</p> <p><i>A message displays indicating the download file may have been cached locally to your computer.</i></p>
2.	<p>Click the <b>OK</b> button.</p> <p><i>The document downloads to your computer.</i></p>
3.	<p>To view the document, navigate to <b>Recent Download History</b> (Chrome) <b>Download History</b> (Edge) and click the <b>Open</b> link.</p> <p><i>The document opens in the selected format.</i></p> <p><b>Note:</b> Once the document is open, you can print it by selecting <b>Print</b> from the <b>File</b> menu.</p>

## Override an Approval

**Note:** This functionality allows you to override an approval if your company is using Supervisor workflow with online applications. This function is only available if you have been entitled to override approvals.

Step	Action
1.	<p>From the <b>View Request</b> screen, click the <b>Override Approval</b> link displayed on the right-side of the screen.</p> <p><b>Note:</b> To navigate to the <b>View Request</b> screen, refer to Steps 1–4 of the <b>View/Approve/Reject a Request</b> topic.</p> <p><i>The Override Approval screen displays the request details.</i></p>
2.	<p>Scroll down to the <b>Override Information</b> section and select the desired status from the drop-down list.</p>
3.	<p>Based on the status selected, you will be required to select and/or enter additional information.</p> <p><b>Note:</b> If you are selecting a new approver, they need to be entitled as an approver in the CitiManager Site already otherwise they will not be able to process the request. If you are rejecting the request, type a reason for the override in the <b>Comments</b> field. By default, the <b>Allow for Resubmit</b> checkbox is selected. De-select the checkbox if resubmission is not allowed.</p>
4.	<p>Click the <b>Submit</b> button.</p> <p><i>A confirmation message displays.</i></p>
5.	<p>Click the <b>OK</b> button.</p> <p><i>A confirmation message displays indicating the override has been submitted successfully.</i></p>

## Delete Application Request

**Note:** This function is only available if you have been entitled to delete application requests. You can only delete requests if they have not been sent to the processor.

Step	Action
1.	<p>From the <b>View Request</b> screen, click the <b>Delete Application Request</b> link displayed on the right-side of the screen.</p> <p><b>Note:</b> To navigate to the <b>View Request</b> screen, refer to Steps 1–4 of the <b>View/Approve/Reject a Request</b> topic. For additional information about how to view account documents, refer to the <b>View and Attach Account Documents</b> topic in this User Guide.</p> <p><i>The comments window displays.</i></p>
2.	<p>In the comments field, type a reason for deleting the request and click the <b>Confirm</b> button.</p> <p><b>Note:</b> You must enter comments in order to delete the request. There is a 2,000 character limit.</p> <p><i>A confirmation message displays indicating the request has been deleted. No e-mail or SMS message will be sent to acknowledge the deletion of the online application.</i></p>

## Create User in CitiManager

### Key Concepts

Use this procedure to create a new Non-cardholder in the CitiManager Site. You can grant the new user access to a single company or multiple companies. You can only assign companies to a new user that you are entitled to yourself.

The first part of this procedure only grants login access to the CitiManager Site. If you are creating a CitiManager Site Non-cardholder user who will have Single Sign-On (SSO) access to CitiManager — Expense Management (Expense Management), complete the steps for the **Add CitiManager — Expense Management SSO Access** topic.

Once the new user is created, the Registration ID and Registration Passcode e-mails are sent to them so they can access the CitiManager Site. The registration details for a new user expire 60 days from the date they are created. If registration details expire, they can be re-sent rather than creating new ones.

If the Non-cardholder created will be permitted to call Citi for support or make changes to their account, the New Program Administrator Form must be completed so the new user can be added to the Non-Cardholder Verification Database (NCVD). If needed, contact your Global/Regional Service Manager (CAS) for the form and once completed, submit it back to them.

### Step-by-Step Instructions

#### Create Non-cardholder User — Assign Single Company

Use this procedure to create a new Non-cardholder and assign a single company. If you need to assign multiple companies, refer to the **Create Non-cardholder User — Multiple Companies — Copy Your Access** or **Create Non-cardholder User — Multiple Companies — Customize Access** topics.

Step	Action
1.	<p>From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and from the <b>Create a New User</b> sub-menu, click <b>Non-cardholder</b>.</p> <p><i>The Manage Users screen displays.</i></p>
2.	<p>Click the <b>Create</b> button.</p> <p><i>The Create New User screen displays.</i></p>

Step	Action
3.	From the <b>Personal Details</b> section, type the user's first and last name in the text entry fields. <b>Note:</b> An asterisk (*) indicates a required field.
4.	From the <b>Contact Details</b> section, type the required address and contact information in the text entry fields or select it from the drop-down list. <b>Note:</b> An asterisk (*) indicates a required field.
5.	From the <b>Company, User Role(s) and Hierarchy</b> section, verify the <b>Single company</b> radio button is selected.
6.	Select the checkbox for the role you are assigning.
7.	Click the <b>Set Hierarchy</b> link. <i>The Set Hierarchy screen displays a list of available hierarchies. Only hierarchies within your span of control display.</i>
8.	Click the <b>(+) plus sign</b> icon to expand the hierarchy tree. Click the checkboxes for the hierarchies you wish to assign to the user. When you are finished, click the <b>Select</b> button.
9.	Click the <b>(+) plus sign</b> icon from the <b>Entitlements</b> section header to expand it. Select/deselect the checkbox for the entitlements you wish to assign/unassign the user.
10.	When you are finished, click the <b>Continue</b> button. <i>The Confirm Details screen displays.</i>
11.	Review and confirm the details for the user and click the <b>Save</b> button. <i>A confirmation message displays at the top of the screen. The Registration ID and Registration Passcode e-mails are sent to the user so they can access the CitiManager Site.</i>
12.	Review and confirm the card details, contact details, user roles and entitlements for the user and click the <b>Save</b> button. <i>A confirmation message displays at the top of the screen. The Registration ID and Registration Passcode e-mails are sent to the user so they can access the CitiManager Site.</i>

#### Create Non-cardholder User — Multiple Companies — Copy Your Access

Use this procedure to create a new Non-cardholder and assign them to multiple companies. The hierarchies and entitlements assigned will match your access exactly. When you copy your access, you can view the hierarchies and entitlements for the companies assigned but you cannot change them. If you want to change the hierarchies and entitlements assigned to a company, refer to the **Create Non-cardholder User – Multiple Companies – Customize Access** topic.

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and from the <b>Create a New User</b> sub-menu, click <b>Non-cardholder</b> . <i>The Manage Users screen displays.</i>
2.	Click the <b>Create</b> button. <i>The Create New User screen displays.</i>
3.	From the <b>Personal Details</b> section, type the user's first and last name in the text entry fields. <b>Note:</b> An asterisk (*) indicates a required field.

Step	Action
4.	<p>From the <b>Contact Details</b> section, type the required address and contact information in the text entry fields or select it from the drop-down list.</p> <p><b>Note:</b> An asterisk (*) indicates a required field.</p>
5.	<p>From the <b>Company, User Role(s) and Hierarchy</b> section, select the checkbox for the role you are assigning to the user first, then click the <b>Multiple companies</b> radio button.</p> <p><i>The Set Access: Companies, Hierarchies, and Entitlements screen displays a list of companies that are within your span of control.</i></p>
6.	<p>From the <b>Copy My Access</b> tab, you can copy your exact access for all companies or for selected companies.</p> <p>To copy the hierarchies and entitlements for all the companies you are entitled, ensure the <b>All Companies</b> radio button is selected and click the <b>Save</b> button and continue to Step 7.</p> <p>OR</p> <p>To copy the hierarchies and entitlements for selected companies, click the <b>Selected Companies</b> radio button. Select the checkboxes for the companies you want to add to the new user and click the <b>Save</b> button and continue to Step 7.</p> <p><b>Note:</b> To view the hierarchy for a selected company, click the <b>View Hierarchy</b> link from the <b>Hierarchy</b> column. To view the entitlements assigned for a selected company, click the <b>View Entitlements</b> link from the <b>Entitlements</b> column. When you are finished, click the <b>OK</b> button to return to the <b>Set Access: Companies, Hierarchies, and Entitlements</b> screen. You are not able to change the hierarchy or entitlements using the <b>Copy My Access</b> option. Refer to the <b>Customize Access</b> steps.</p> <p><i>The Create New User screen displays.</i></p>
7.	<p>Next, the hierarchy and entitlements for the base company for the Non-cardholder (displayed under the <b>Company Name</b> field in the <b>Company, User Role(s) and Hierarchy</b> section) need to be set.</p> <ol style="list-style-type: none"> <li>Click the <b>Set Hierarchy</b> link and when the <b>Set Hierarchy</b> screen displays, click the <b>(+) plus sign</b> icon to expand the hierarchy tree. Click the checkboxes for the hierarchies you wish to assign the base company. When you are finished, click the <b>Select</b> button. <i>The Create New User screen displays.</i></li> <li>Click the <b>(+) plus sign</b> icon from the <b>Entitlements</b> section header to expand it. Select/deselect the checkbox for the entitlements you wish to assign/unassign the base company.</li> <li>When you are finished, click the <b>Continue</b> button. <i>The Confirm Details screen displays.</i></li> </ol>
8.	<p>Review the contact details, the user role and companies assigned. Click the <b>View Hierarchy</b> or <b>View Entitlements</b> links to view the hierarchies and entitlements assigned to each of the companies. When you are finished, click the <b>Save</b> button.</p> <p><i>A confirmation message displays at the top of the screen. The Registration ID and Registration Passcode e-mails are sent to the user so they can access the CitiManager Site.</i></p>



### Create Non-cardholder User — Multiple Companies — Customize Access

Use this procedure to create a new Non-cardholder and assign them multiple companies and customize the hierarchies and entitlements assigned to them.

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and from the <b>Create a New User</b> sub-menu, click <b>Non-cardholder</b> . <i>The Manage Users screen displays.</i>
2.	Click the <b>Create</b> button. <i>The Create New User screen displays.</i>
3.	From the <b>Personal Details</b> section, type the user's first and last name in the text entry fields. <b>Note:</b> An asterisk (*) indicates a required field.
4.	From the <b>Contact Details</b> section, type the required address and contact information in the text entry fields or select it from the drop-down list. <b>Note:</b> An asterisk (*) indicates a required field.
5.	From the <b>Company, User Role(s) and Hierarchy</b> section, select the checkbox for the role you are assigning to the user first, then click the <b>Multiple companies</b> radio button. <i>The Set Access: Companies, Hierarchies, and Entitlements screen displays a list of companies that are within your span of control.</i>
6.	Click the <b>Customize Access</b> tab. <i>The companies listed are now editable and the hierarchy levels and entitlements can be modified for the companies selected.</i>
7.	To change the companies to be assigned the new user, select/deselect the checkboxes for the desired companies. <b>Note:</b> Click the <b>Select All</b> or <b>Deselect All</b> buttons in the header to select or deselect all the companies.
8.	To change the hierarchy for a selected company from the default assigned based on your settings, click the <b>Set Hierarchy</b> link from the <b>Hierarchy</b> column. When the <b>Set Hierarchy</b> screen displays, click the <b>(+) plus sign</b> icon to expand the hierarchy tree. Select the checkboxes for the hierarchies you wish to assign the user for the company. When you are finished, click the <b>Save</b> button. Repeat this step for each of the companies you want to change. <i>The Set Access: Companies, Hierarchies, and Entitlements screen re-displays.</i>
9.	To change the entitlements for a selected company from the default assigned based on your settings, click the <b>Set Entitlements</b> link from the <b>Entitlements</b> column. When the <b>Select Entitlements</b> screen displays, select/deselect the checkboxes for the entitlements you want to assign the new user for the company. When you are finished, scroll to the bottom of the screen and click the <b>Save</b> button. Repeat this step for each of the companies you want to change. <i>The Set Access: Companies, Hierarchies, and Entitlements screen re-displays.</i>
10.	When you are finished setting the hierarchy and entitlements for each of the selected companies, click the <b>Save</b> button. <i>The Create New User screen re-displays.</i>

Step	Action
11.	<p>Next, the hierarchy and entitlements for the base company for the Non-cardholder (displayed under the <b>Company Name</b> field in the <b>Company, User Role(s) and Hierarchy</b> section) need to be set.</p> <ul style="list-style-type: none"> <li>a) Click the <b>Set Hierarchy</b> link and when the <b>Set Hierarchy</b> screen displays, click the <b>(+) plus sign</b> icon to expand the hierarchy tree. Click the checkboxes for the hierarchies you wish to assign the base company. When you are finished, click the <b>Select</b> button. <i>The Create New User screen displays.</i></li> <li>b) Click the <b>(+) plus sign</b> icon from the <b>Entitlements</b> section header to expand it. Select/deselect the checkbox for the entitlements you wish to assign/unassign the base company.</li> <li>c) When you are finished, click the <b>Continue</b> button. <i>The Confirm Details screen displays.</i></li> </ul>
12.	<p>Review the contact details, the user role and the companies assigned. Click the <b>View Hierarchy</b> or <b>View Entitlements</b> links to view the hierarchies and entitlements assigned to each of the companies. When you are finished, click the <b>Save</b> button.</p> <p><i>A confirmation message displays at the top of the screen. The Registration ID and Registration Passcode e-mails are sent to the user so they can access the CitiManager Site.</i></p>

### Add CitiManager — Expense Management SSO (Single Sign On) Access

If you are creating a CitiManager Site Non-cardholder user with CitiManager — Expense Management SSO access, continue with the following steps.

SSO must be enabled in Expense Management. SSO can only be enabled by Citi. Contact your Citi CAS representative to have SSO enabled for Expense Management.

Step	Action
1.	<p>After creating the user in the CitiManager Site, open the Expense Management application as an authorized Non-cardholder.</p> <p><b>Note:</b> If you do not have the proper Expense Management authority, contact your Company Program Administrator or your Citi CAS representative.</p>
2.	<p>From the <b>Home</b> screen, from the <b>Create a New User</b> sub-menu, click <b>Non-cardholder</b>.</p> <p><i>The Search Reporting Structure screen displays.</i></p>
3.	<p>In the <b>Search Criteria</b> section, select the role type from the <b>Search By</b> drop-down list and click the <b>Search</b> button.</p> <p><i>The Citi User and Setup Screen displays.</i></p>
4.	<p>In the <b>Search By E-mail</b> field, type the e-mail address listed on the user's CitiManager Site profile and click the <b>Search</b> button.</p> <p><i>Results display for the e-mail address entered.</i></p> <p><b>Note:</b> If multiple CitiManager Site profiles exist for the same e-mail address, all profiles will display in the search results.</p>
5.	<p>In the <b>Search Results</b> section, click the desired profile link from the <b>User Name</b> column.</p> <p><i>The User Information screen displays with the User Name and User ID for the chosen CitiManager ID.</i></p>
6.	<p>In the <b>User Information</b> section, select the desired template to be used from the <b>Template</b> drop-down list and click the <b>Save</b> button.</p> <p><i>A confirmation message displays indicating the user was successfully added.</i></p> <p><b>Note:</b> The next time the Non-cardholder signs into the CitiManager Site, the <b>Expense Management</b> link will be available from <b>Web Tools</b>.</p> <p>After linking the account, only the Template field can be modified on the <b>Expense Management User Information</b> screen.</p>

## Create New Account Application

### Key Concepts

If your company uses the New Account Application process to initiate and process a card application for a potential Cardholder, complete the following steps:

- Assign the card account to a hierarchy in your organization.
- Complete and submit the New Account Application form.

### Step-by-Step Instructions

Step	Action
1.	<p>From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and from the <b>Create a New User</b> sub-menu, click <b>Cardholder</b>.</p> <p><i>The New Account Application: Select Hierarchy screen displays.</i></p>
2.	<p>From the <b>Select Hierarchy</b> section, select the radio button for the hierarchy that will be assigned. Click the <b>(+) plus sign</b> icon to expand the hierarchy.</p> <p><b>Note:</b> Hierarchy numbers are seven digits long and there are up to eight levels of hierarchy, depending on how your company's reporting structure is defined at Citi. For Hierarchy Level 1, the leading two digits reference the bank and BIN number. For Hierarchy Levels 2-7, the leading two digits are 00.</p>
3.	<p>Click the <b>Continue</b> button.</p> <p><i>Depending on your company set-up, either the County and Language or Card Application Details screen displays.</i></p> <p><b>Note:</b> If the <b>Country and Language</b> screen displays, continue to Step 4. If the <b>Card Application Details</b> screen displays, continue to Step 7.</p>
4.	<p>From the <b>Select Country</b> drop-down list, select the country.</p>
5.	<p>From the <b>Select Language</b> drop-down list, select the language.</p>
6.	<p>Click the <b>Show Form</b> button.</p> <p><i>The Card Application Details screen displays.</i></p>
7.	<p>Complete the application details.</p> <p><b>Note:</b> An asterisk (*) indicates a required field.</p>
8.	<p>Click the <b>Submit</b> button.</p> <p><b>Note:</b> The <b>Save as Draft</b> link allows you to save your progress to finish later.</p> <p><i>A confirmation message displays.</i></p>
9.	<p>To close the message, click the <b>OK</b> button.</p> <p><i>The application is sent to Citi for processing.</i></p>

## Print Multiple Statements

### Key Concepts

You can download and print multiple Cardholder statements from previous months. You can download statements for individually or centrally billed accounts.

The statement will be downloaded in PDF format and then it can be opened to print by selecting **Print** from the **File** menu.

### Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Print Multiple Statement</b> link. <i>The Search for Statements screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> button. <b>Note:</b> The maximum allowed date range is 180 days. To search for users at a specific hierarchy level, click the <b>Lookup Hierarchy</b> link. If necessary, click the <b>(+) plus sign</b> icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the <b>Select</b> button. <i>The search results display at the bottom of the screen.</i>
3.	Select the checkboxes for the statements you wish to download and click the <b>Download Statements</b> button displayed at the bottom of the screen. It is possible to select up to 2,000 transactions for a single download request. You can keep track of how many transactions and statements have been selected by looking to the right of the <b>Download Statements</b> button. <i>A message displays indicating the file may be saved to your computer.</i>
4.	Click the <b>OK</b> button. <i>The document downloads to your computer.</i>
5.	To view the document, navigate to <b>Recent Download History</b> (Chrome) or <b>Download History</b> (Edge) and click the <b>Open</b> link. <i>The document opens in the PDF format.</i> <b>Note:</b> Once the document is open, you can print it by selecting <b>Print</b> from the <b>File</b> menu.

## Assign/Unassign CitiManager — Reporting

### Key Concepts

It is possible to assign and unassign CitiManager — Reporting (Reporting) to a Non-cardholder's access.

You can only assign Reporting to another Non-cardholder if you are already entitled yourself. Access to Reporting will be available to the Non-cardholder within 24 hours.

When assigning Reporting, there are three role options from which to choose. These roles determine the type of access the user will have for the **Organizational Shared** folders.

- **Read Only** — The user will be able to run any report templates from **Shared Reports** and save report templates as their own. However, they do not have access to save the report as a shared template.
- **Read/Write** — The user will be able to run any report template from **Shared Reports** and save report templates as their own or shared with other Non-cardholders.
- **Read/Write/Delete** — The user will be able to run any report template from **Shared Reports** and save report templates as their own or shared with other Non-cardholders. In addition, they can delete shared report templates from the **Organizational Shared** folders.

## Assign CitiManager — Reporting

## Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the account you wish to assign Reporting. <i>The Non-Cardholder Details screen displays.</i>
4.	Click the <b>Assign/Unassign Applications</b> link that displays on the left-side of the screen. <i>The Assign/Unassign Applications screen displays.</i>
5.	From the <b>Assign Additional Application</b> section, select the radio button for <b>Citibank Custom Reporting System</b> . <i>The CCRS Details screen displays.</i>
6.	Click the <b>Set Hierarchy</b> link that displays under the <b>Assign New Hierarchy</b> header. When the <b>Select Hierarchy</b> screen displays, Click the <b>(+) sign icon</b> to expand the hierarchy tree as necessary. Select the checkbox(s) for the hierarchies you wish to assign to the user. When you are finished, click the <b>Save</b> button.
7.	To edit the role, click the <b>Update Role</b> link. When the <b>Edit Role</b> section displays, select the radio button for the desired folder access option. You can only grant access to the options to which you are entitled. If you wish to deny a user a specific reporting attribute (e.g. Date of Birth or SSN), click the <b>Update Deny Attribute</b> link that displays under the <b>Deny Attribute List</b> header and when the <b>Deny Attribute List</b> displays, select the checkbox for each of the attributes you do not want to be visible to the user. When you are finished click the <b>Save</b> button. <i>The CCRS Confirm screen displays.</i>
8.	Review the details click the <b>Save</b> button. <i>A confirmation message displays.</i>
9.	Click the <b>OK</b> button. <i>The Non-Cardholder Details screen displays.</i>

## Unassign CitiManager — Reporting

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search for Users screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the account you wish to unassign Reporting. <i>The Non-Cardholder Details screen displays.</i>
4.	Click the <b>Assign/Unassign Applications</b> link that displays on the right-side of the screen. <i>The Assign/Unassign Applications screen displays.</i>
5.	From the <b>Unassign Current Application Assignments</b> section header, click the <b>(+) plus sign</b> icon to expand the section.
6.	Select the <b>Citibank Custom Reporting System</b> checkbox.
7.	Select the checkbox for the hierarchy to be unassigned.
8.	Click the <b>Save</b> button. <i>A confirmation message displays indicating the application was successfully unassigned.</i>
9.	Click the <b>OK</b> button. <i>The Non-Cardholder Details screen displays.</i>

## Assign/Unassign Companies

## Key Concepts

You can assign a user to another company so they can manage accounts that reside in another hierarchy that is not currently attached to their username.

You can only assign companies for existing or pending users and for companies to which you are entitled.

## Step-by-Step Instructions

## Assign a Company

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.

Step	Action
3.	From the <b>Username</b> column, click the link for the user you wish to assign a company. <i>The Cardholder or Non-Cardholder Details screen displays.</i>
4.	Click the <b>Assign/Unassign Companies</b> link that displays on the left-side of the screen. <i>The Assign/Unassign Companies screen displays.</i>
5.	Click the <b>Assign Company</b> button. <i>The User Role &amp; Hierarchy Assignment screen displays.</i>
6.	From the <b>Company</b> , <b>User Role(s)</b> and <b>Hierarchy</b> section drop-down list, select the company you would like to assign this user.
7.	Click the <b>Set Hierarchy</b> link that displays to the right of the drop-down list. <i>The Select Hierarchy screen displays.</i>
8.	Click the <b>(+) plus sign</b> icon to expand the hierarchy. Click the checkbox(es) for the hierarchy or hierarchies you wish to assign to the user. When you are finished, click the <b>Select</b> button. <i>The Assign Companies screen displays.</i>
9.	From the <b>Role</b> column, select the checkbox next to the desired role.
10.	On the far right-side of the <b>Entitlements</b> section header, click the <b>(+) plus sign</b> icon to review and edit entitlements for this user. <b>Note:</b> This section header will not expand until a role is selected.
11.	Select the checkbox(es) for all the entitlements you wish to assign this user for the assigned company. <b>Note:</b> Click the <b>Select All</b> or <b>Deselect All</b> link that displays under the <b>(+) plus sign</b> icon to select all or deselect all entitlements.
12.	Scroll to the bottom of the screen and click the <b>Continue</b> button. <i>The Confirm Details screen displays.</i>
13.	Review the details screen and scroll to the bottom of the screen and click the <b>Assign Company</b> button to grant this account access to the selected company with the assigned entitlements. <i>A confirmation message displays indicating that the company is successfully assigned to the user.</i>
14.	Click the <b>OK</b> button. <i>The Cardholder or Non-Cardholder Details screen displays.</i>

#### Unassign a Company

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.

Step	Action
3.	From the <b>Username</b> column, click the link for the user you wish to unassign a company. <i>The Cardholder or Non-Cardholder Details screen displays.</i>
4.	Click the <b>Assign/Unassign Companies</b> link that displays on the left-side of the screen. <i>The Assign/Unassign Companies screen displays.</i>
5.	Select the checkbox next to the company you wish to unassign this user.
6.	Click the <b>Unassign Company</b> button. <i>A confirmation message displays verifying you want to unassign the company.</i> <b>Note:</b> If the user only has one company, it cannot be unassigned.
7.	Click the <b>OK</b> button. <i>A confirmation message displays indicating the company has been successfully unassigned.</i>
8.	Click the <b>OK</b> button. <i>The Cardholder or Non-Cardholder Details screen displays.</i>

## Activate/Deactivate User

### Key Concepts

You can activate an existing user that was deactivated due to lack of use or you can manually deactivate an existing user if they left your organization or changed roles and no longer required access to the CitiManager Site. The activated/deactivated status indicates if the user can log into the CitiManager Site or not.

Usernames automatically deactivate if a user fails to log in for 100 consecutive days.

When manually activating or deactivating a user, you are required to enter the reason for activating or deactivating the username.

### Step-By-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To narrow your search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the user you wish to activate or deactivate. <i>The Cardholder or Non-Cardholder Details screen displays.</i>
4.	From the left-side of the screen, click the <b>Activate User</b> or <b>Deactivate User</b> link. <b>Name:</b> The name of the link displayed is dependent on the status of the user (activated or deactivated). <i>The Activate or Deactivate screen displays.</i>



Step	Action
5.	In the <b>Reason for activation/deactivation</b> text entry field, type the reason for the activation/deactivation.
6.	<p>Click the <b>Activate</b> or <b>Deactivate</b> button.</p> <p><b>Note:</b> If the user's current status is <b>Activated</b>, the <b>Deactivate</b> button displays. If the user's current status is <b>Deactivated</b>, the <b>Activate</b> button displays.</p> <p>The maintenance activity is logged in the Activate/Deactivate history table that displays at the bottom of the screen. Click the <b>Download in CSV Format</b> link to download the history in text format.</p>

### Edit a User's CitiManager Profile (Update User)

#### Key Concepts

It is possible to update a user's personal details, contact details, their roles, hierarchy and the entitlements assigned to them. Details that can be updated include:

- **Personal Details** — Username, first and last name
- **Contact Details** — Address, phone number, e-mail address
- **User Roles and Hierarchy** — Roles such as Cardholder and Non-cardholder and hierarchy assigned to the role.
- **Entitlements** — Entitlements assigned to the user

You can only assign additional entitlements to another user if you are already entitled yourself. You cannot change your own entitlements.

#### Step-By-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	<p>To narrow a search, type the desired search criteria and click the <b>Search</b> link.</p> <p><b>Note:</b> To search by <b>Employee ID</b>, <b>Status Type</b> or <b>Billing Type</b>, click the <b>Add More Criteria</b> link.</p> <p><i>The search results display at the bottom of the screen.</i></p> <p><b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.</p>
3.	From the <b>Username</b> column, click the link for the user you wish to update. <i>The Cardholder or Non-Cardholder Details screen displays.</i>
4.	Click the <b>Edit CitiManager Profile</b> link that displays on the left-side of the screen. <i>The Update User screen displays the Personal Details, Contact Details, User Role(s) and Hierarchy, and Entitlements.</i>
5.	From the <b>Personal Details</b> section, update the user's title or username as necessary.
6.	From the <b>Contact Details</b> section, update the user's address, phone numbers, and e-mail address as necessary.

Step	Action
7.	<p>From the <b>User Role(s) and Hierarchy</b> section, complete the following steps to update the users role and hierarchy as necessary:</p> <ul style="list-style-type: none"> <li>a) Click the <b>Change Role</b> link to unlock the role checkboxes and then select/deselect the checkboxes to change the user's role.</li> <li>b) Click the <b>Set Hierarchy</b> link to update the user's hierarchy. <i>The Set Hierarchy Screen displays.</i></li> <li>c) Click the <b>(+) plus sign</b> icon to expand the hierarchy tree. Click the checkboxes for the hierarchies you wish to assign to the user. When you are finished, click the <b>Select</b> button. <i>The Update User screen displays.</i></li> </ul>
8.	<p>From the <b>Entitlements</b> section, complete the following steps to update a user's entitlements as necessary:</p> <ul style="list-style-type: none"> <li>a) From the <b>Entitlements</b> section header, click the <b>(+) plus sign</b> icon to expand the section.</li> <li>b) Select or deselect the entitlements you would like to assign or unassign the user.</li> </ul>
9.	<p>When you are finished making all changes, click the <b>Continue</b> button that displays at the bottom of the screen. <i>The Confirm Details screen displays.</i></p>
10.	<p>Verify your changes and click the <b>Save</b> button. <i>A confirmation message displays at the top of the screen.</i></p>
11.	<p>Click the <b>OK</b> button. <i>The Cardholder or Non-Cardholder Details screen displays.</i></p>

## Emulate Cardholder

### Key Concepts

The CitiManager Site allows select Program Administrators to emulate a Cardholder's profile to view the CitiManager Site as they do. You will not be able to perform Cardholder maintenance actions, such as changing the profile or updating contact information. However, you can assist Cardholders with navigation using this option. The Cardholder does not need to be logged in for you to emulate them.

The Emulate Cardholder function needs to be enabled by Citi first. Once it's enabled, the Emulate User entitlement has to be assigned to anyone who needs to emulate Cardholders.

You can only emulate Cardholders who have registered for the CitiManager Site and have a username.

While in Emulation Mode, the following buttons display when you click the **Emulating Card** drop-down list that displays at the top of the screen:

Option	Description
End Emulation	Return to Non-cardholder role and close emulation screen.
Toggle Window	Minimize the emulation screen to the bottom-left of your screen. You can then choose to maximize the emulation again at any point during this active session.
Refresh	Refresh the emulation mode screen, if necessary.

### Step-By-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the card account you wish to view. <b>Note:</b> You are only able to emulate a Cardholder who is registered in the CitiManager Site and has a username created. If a user has registered and created a username, it will display in the <b>Username</b> column and the <b>Status</b> displays as <b>Activated</b> . <i>The Cardholder Details screen displays.</i>
4.	From the menu that displays on the left-side of the screen, click the <b>Emulate Card Holder</b> link. <i>The confirmation agreement window displays.</i>
5.	Click the <b>Accept</b> button. <i>The Cardholder Home screen displays and the Emulating Card drop-down list displays at the top-center of the screen.</i>
6.	Click the drop-arrow to display the emulation option buttons.

### Replace Lost/Stolen/Never Received/Damaged Card

#### Key Concepts

When a card has been lost, stolen, never received or damaged you are able to:

- Initiate a card replacement for the Cardholder in the CitiManager Site.
- Choose the shipping address (either current mailing address or an alternate).
- Choose a delivery method (standard or expedite if available based on your agency/organizations options).

When there is fraud, the system places a temporary block on the account, and you are asked to call Customer Service to report the fraudulent transaction(s) and arrange for a replacement card.

You are only allowed to initiate the replacement if last card issued date has elapsed 15 days.

As Program Administrator you can also access the View Fraud and Audit Reports in CitiManager — Reporting.

The steps required for initiating a replacement card vary based on the reason for the request. Complete the appropriate procedure based on one of the scenarios outlined below:

- Initiate replacement for lost, stolen or never received card — fraudulent activity
- Initiate replacement for lost, stolen or never received card — no fraudulent activity
- Initiate replacement for damaged card

## Initiate Replacement For Lost, Stolen Or Never Received Card — Fraudulent Activity

### Step-By-Step Instructions

Step	Action
1.	From the navigation bar, position the mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the card account you wish to view. <i>The Cardholder Details screen displays.</i>
4.	Click the <b>Replace Card</b> link that displays on the left-side of the screen or click the <b>Replace Card</b> button from the <b>Current Balance</b> section of the screen. <b>Note:</b> This link only displays if status of the card is <b>Open</b> . <i>The Replace Lost/Stolen/Never Received/Damaged Card — Card Details screen displays.</i>
5.	Review the information displayed in the <b>Card Information</b> section to verify the correct card was selected and from the <b>Select Reason</b> drop-down list, select either <b>Lost</b> , <b>Stolen</b> , or <b>Never Received</b> .
6.	From the <b>Have you noticed any fraudulent transactions on your card</b> options, select the <b>Yes</b> radio button.
7.	Click the <b>Continue</b> button. <i>A message displays indicating the card will be blocked immediately.</i>
8.	Click the <b>OK</b> button. <i>A confirmation window displays indicating the card has been temporarily blocked and to contact Customer Service.</i> <b>Note:</b> Please call Customer Service to report the fraudulent transaction(s) and arrange for a replacement card.
9.	Click the <b>OK</b> button.

## Initiate Replacement For Lost, Stolen Or Never Received Card — No Fraudulent Activity

### Step-By-Step Instructions

Step	Action
1.	From the navigation bar, position the mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.

Step	Action
3.	From the <b>Username</b> column, click the link for the card account you wish to view. <i>The Cardholder Details screen displays.</i>
4.	Click the <b>Replace Card</b> link that displays on the left-side of the screen or click the <b>Replace Card</b> button from the <b>Current Balance</b> section of the screen. <b>Note:</b> This link only displays if status of the card is <b>Open</b> . <i>The Replace Lost/Stolen/Never Received/Damaged Card — Card Details screen displays.</i>
5.	Review the information displayed in the <b>Card Information</b> section to verify the correct card was selected and from the <b>Select Reason</b> drop-down list, select either <b>Lost</b> , <b>Stolen</b> , or <b>Never Received</b> .
6.	From the <b>Have you noticed any fraudulent transactions on your card</b> options, select the <b>No</b> radio button.
7.	Click the <b>Continue</b> button. <i>Either the OTP Details or Replace Lost/Stolen/Never Received/Damaged Card — Overview screen displays.</i>
8.	If a One-time Passcode is necessary, complete the following steps. Otherwise, continue to Step 9. a) Select the radio button for the desired receipt option and click the <b>Continue</b> button. b) Once received, type the One-time Passcode and click the <b>Continue</b> button. <i>The Replace Lost/Stolen/Never Received/Damaged Card — Overview screen displays.</i>
9.	From the <b>Shipping Options</b> section, select either the radio button for <b>Current Mailing Address</b> or <b>Alternate Address</b> . If <b>Alternate Address</b> is selected, complete the <b>Address Line 1</b> , <b>City</b> , <b>State</b> and <b>Postal Code</b> fields.
10.	From the <b>Delivery Method</b> section, select the radio button for desired delivery method.
11.	Click the <b>Submit</b> button. <i>A confirmation message displays, and the card will be blocked effective immediately.</i> <b>Note:</b> If you are shipping the card to the default address and standard shipping is selected, a message displays that the card will be delivered within 7-10 days. If expedited shipping is selected, a message will display indicating the fee charged for expedited services, if applicable. If a replacement card was previously requested and a subsequent replacement card request is being made while the first card could still be in the mail (within the expected delivery time), a message will display indicating a card has been recently issued on a specified date. Please allow ten business for that card to arrive. If you still need to report the card lost or stolen please contact Customer Service. If the expected delivery time for the replacement card has past and that card is lost, a message displays indicating that the card has been temporarily blocked and to contact Customer Service.
12.	Click the <b>OK</b> button.

## Initiate Replacement for Damaged Card

### Step-By-Step Instructions

Step	Action
1.	From the navigation bar, position the mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the card account you wish to view. <i>The Cardholder Details screen displays.</i>
4.	Click the <b>Replace Card</b> link that displays on the left-side of the screen or click the <b>Replace Card</b> button from the <b>Current Balance</b> section of the screen. <b>Note:</b> This link only displays if status of the card is <b>Open</b> . <i>The Replace Lost/Stolen/Never Received/Damaged Card — Card Details screen displays.</i>
5.	Review the information displayed in the <b>Card Information</b> section to verify the correct card was selected and from the <b>Select Reason</b> drop-down list, select <b>Damaged/Other</b> . <b>Note:</b> Selecting <b>Damaged/Other</b> initiates a card replacement and retains the existing account number.
6.	Click the <b>Continue</b> button. <i>Either the OTP Details or Replace Lost/Stolen/Never Received/Damaged Card — Overview screen displays.</i>
7.	If a One-time Passcode is necessary, complete the following steps. Otherwise, continue to Step 8. a) Select the radio button for the desired receipt option and click the <b>Continue</b> button. b) Once received, type the One-time Passcode and click the <b>Continue</b> button. <i>The Replace Lost/Stolen/Never Received/Damaged Card — Overview screen displays.</i>
8.	From the <b>Shipping Options</b> section, select either the radio button for <b>Current Mailing Address</b> or <b>Alternate Address</b> . If <b>Alternate Address</b> is selected, complete the <b>Address Line 1</b> , <b>City</b> , <b>State</b> and <b>Postal Code</b> fields. <b>Note:</b> If the card has a Bulk/Site address associated with it, the <b>Alternate Address</b> field will not display. Only a Program Administrator can request a card to be shipped to an alternate address.
9.	From the <b>Delivery Method</b> section, select the radio button for desired delivery method.

Step	Action
10.	<p>Click the <b>Submit</b> button.</p> <p><i>A confirmation message displays, and the card will be blocked effective immediately.</i></p> <p><b>Note:</b> If you are shipping the card to the default address and standard shipping is selected, a message displays that the card will be delivered within 7-10 days.</p> <p>If expedited shipping is selected, a message will display indicating the fee charged for expedited services, if applicable.</p> <p>If a replacement card was previously requested and a subsequent replacement card request is being made while the first card could still be in the mail (within the expected delivery time), a message will display indicating a card has been recently issued on a specified date. Please allow ten business for that card to arrive. If you still need to report the card lost or stolen please contact Customer Service. If the expected delivery time for the replacement card has past and that card is lost, a message displays indicating that the card has been temporarily blocked and to contact Customer Service.</p>
11.	Click the <b>OK</b> button.

## Reset a User's Password

### Key Concepts

You can initiate a password reset for a user's profile. Once you initiate the reset process, an automated message is sent to the e-mail associated with the profile that will allow the user to reset their password.

**Note:** This function is only available if you have been entitled to reset passwords.

### Step-By-Step Instructions

Step	Action
1.	<p>From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link.</p> <p><i>The Search screen displays.</i></p>
2.	<p>To narrow your search, type the desired search criteria and click the <b>Search</b> link.</p> <p><b>Note:</b> To search by <b>Employee ID</b>, <b>Status Type</b> or <b>Billing Type</b>, click the <b>Add More Criteria</b> link.</p> <p><i>The search results display at the bottom of the screen.</i></p> <p><b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.</p>
3.	<p>From the <b>Username</b> column, click the link for the user that needs their password reset.</p> <p><i>The Cardholder or Non-Cardholder Details screen displays.</i></p>
4.	<p>Click the <b>Reset Password</b> link that displays on the left-side of the screen.</p> <p><i>A confirmation message displays verifying you want to reset the password for that user.</i></p>
5.	<p>Click the <b>OK</b> button.</p> <p><i>A confirmation message displays at the top of the screen. An automated e-mail with the password reset steps will be sent to the e-mail associated with the user's profile.</i></p>

## Reset Registration Details

### Key Concepts

If a user has not completed the registration process and has a Pending/Expired status, you can re-send the registration details to them. The registration details for a new user expire 60 days from the date they are created. If registration details expire, they can be re-sent rather than creating new ones.

### Step-By-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the <b>Unregistered</b> link for the user you wish to re-send the registration details. <i>The Cardholder or Non-Cardholder Details screen displays.</i>
4.	Click the <b>Reset Registration Details</b> link displayed on the left-side of the screen. <b>Note:</b> You can also click the <b>Reset Registration Details</b> link that displays at the top of the screen. <i>The Reset Registration Details window displays.</i>
5.	Either keep the default e-mail address, or select the <b>Alternate Email Address</b> radio button and type another e-mail address.
6.	Click the <b>Save</b> button. <i>A confirmation message displays at the top of the screen.</i>

## Update Alerts for a Cardholder

### Key Concepts

As a Non-cardholder you can update alerts received by a Cardholder via e-mail and/or to their mobile device when certain selected activity occurs to the account, for example, when statements are available or when payments are received. You can only update alerts for Cardholders who have registered for the CitiManager Site and therefore have a username created.

A Cardholder has to have a mobile number set-up for alerts for the mobile alerts to be enabled. Cardholders can also change their own alerts by navigating to the **Alerts Subscriptions** screen.

There are two types of alerts to which Cardholders can be subscribed:

- **Transactional Alerts** — An alert is sent when a defined condition or threshold is met, for example an alert is triggered when a payment is received or when a defined percentage of their credit limit is met.
- **Account Alerts** — An alert is sent when there are status changes to your account, for example when your address is changed or when your statement is available.

It is possible to enter up to five e-mail addresses and customize when Cardholders will receive SMS alerts based on:

- Time zone
- Time of day
- Days of week



## Step-By-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options
3.	From the <b>Username</b> column, click the link for the card account you wish to view. <i>The Cardholder Details screen displays.</i>
4.	Click the <b>Update Alerts</b> link that displays on the left-side of the screen. <i>The Update Alerts screen displays.</i>
5.	To enter/edit the e-mail address(s) where alerts will be sent, click the <b>E-mail Addresses — Edit</b> link and complete the following steps when the <b>E-mail Address Preferences</b> window opens: <ul style="list-style-type: none"> <li>a) Type and confirm up to five e-mail addresses.</li> <li>b) Click the <b>Save</b> button.</li> </ul>
6.	To enter/edit the mobile phone number(s) where SMS alerts will be sent, click the <b>Mobile Phone Number — Edit</b> link and complete the following steps when the <b>E-mail Address Preferences</b> window opens: <ul style="list-style-type: none"> <li>a) In the <b>Country Code</b> and <b>Mobile Number</b> field, type a valid mobile phone number where you wish alerts to be sent. <b>Note:</b> Only numeric values are allowed in this field. The country code defaults based on the country associated with your profile.</li> <li>b) Click in the <b>Preferred Time Zone</b> field and select the preferred time zone.</li> <li>c) Click in the <b>From</b> and <b>To</b> fields and select the time-frame in which the Cardholder would like to receive alerts.</li> <li>d) From the list of weekdays, select the days the Cardholder would like to receive alerts.</li> <li>e) Click the <b>Save</b> button.</li> </ul>
7.	To subscribe to alerts, select the <b>E-mail</b> and/or <b>SMS Text</b> checkbox(es) for each of the alerts the Cardholder will receive. To unsubscribe to alerts, deselect the <b>E-mail</b> and/or <b>*SMS Text</b> checkbox(es) for the alerts the Cardholder will no longer receive. <b>Note:</b> Some alerts may be greyed out and unavailable. Alerts that are selected and greyed out are mandatory. For more information about each alert, hover your mouse over the information icon next to the alert name. Some alerts require you to type or select a threshold setting that will trigger the alert. For example, for the <b>Available Credit Remaining %</b> alert, you must select the desired threshold from the <b>% Remaining</b> from the drop-down list. When the selected percent of remaining credit level is met, the Cardholder will receive an alert.
8.	When you are finished, review the terms and conditions at the bottom of the screen and if you agree, select the checkbox. <b>Note:</b> If you do not agree to the terms and conditions, you cannot set the alerts for the Cardholder.
9.	Click the <b>Save</b> button. <i>A confirmation message displays indicating the alerts have been set successfully.</i>

## View Disputes

### Key Concepts

Once a disputed transaction has been successfully submitted online in the CitiManager Site, you can view the following dispute information:

- Transaction Date
- Posting Date
- Transaction Detail
- Dispute Amount/Currency
- Dispute Status
- Dispute Initiation Date
- Disputed by Name
- Reference Number

### Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the card account with the dispute you wish to view. <i>The Cardholder Details screen displays.</i>
4.	Click the <b>View Disputes</b> link that displays on the left-side of the screen. <i>The View Disputes screen displays any disputes associated with the selected card account.</i> <b>Note:</b> A message displays if there are no disputes for this account.
5.	To view additional transaction dispute detail, click the <b>ellipsis (...)</b> link that displays on the right-side of the row you wish to expand. <i>The row expands and the dispute initiation date, the name of the person initiating the dispute and reference number display.</i>

## View/Transfer Cardholder Hierarchy (Single)

### Key Concepts

You can view the hierarchies assigned to a Cardholder and if necessary transfer the account to another hierarchy.

The following default hierarchy entitlement(s) information displays:

- **Company Name:** Name of the company to which the account belongs
- **Unit Name:** Name of the hierarchy to which the account belongs
- **Unit Number:** Number/node of the hierarchy to which the account belongs
- **Full Hierarchy:** Complete hierarchy to which the account is associated

From the **View Hierarchy** screen you can also transfer the Cardholder's hierarchy. If you need to perform bulk hierarchy transfers, refer to the **Transfer Hierarchy (Single and Bulk)** topic in this User Guide.

Hierarchy numbers are seven digits long and there are up to eight levels of hierarchy, depending on how your company's reporting structure is defined at Citi. For Hierarchy Level 1, the leading two digits reference the bank and BIN number. For Hierarchy Levels 2-7, the leading two digits are 00.

### Step-By-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the card account you wish to view. <i>The Cardholder Details screen displays.</i>
4.	Click the <b>View Hierarchy</b> link that displays on the left-side of the screen. <i>The View Hierarchy screen displays.</i>
5.	To expand the view of this card account's sub-hierarchies, click the <b>(+) plus sign</b> icon to expand the hierarchy.
6.	To transfer the Cardholder's hierarchy: <ol style="list-style-type: none"> <li>Click the <b>Transfer Hierarchies</b> link. <i>The Transfer Hierarchies screen displays.</i></li> <li>Select the radio button for the hierarchy where the Cardholder will be transferred and click the <b>Transfer Hierarchy</b> button. <i>A confirmation message displays.</i></li> <li>Click the <b>OK</b> button. <i>The Transfer Hierarchy History screen displays.</i></li> </ol>

## View/Upload Account Documents

### Key Concepts

You can attach documents (such as training certificates or corporate agreements) to a Cardholder account in the CitiManager Site. The documents will stay with the account if the Cardholder moves to another location.

A maximum of five attachments may be added. Each file must be 5MB or less.

The following file types are supported:

- .jpg
- .jpeg
- .png
- .pdf

You can view, attach and delete account documents. Documents can also be attached during the approval process of an application and also to a closed account.

### Step-By-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link. <i>The Search screen displays.</i>
2.	To perform a search, type the desired search criteria and click the <b>Search</b> link. <b>Note:</b> To search by <b>Employee ID</b> , <b>Status Type</b> or <b>Billing Type</b> , click the <b>Add More Criteria</b> link. <i>The search results display at the bottom of the screen.</i> <b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.
3.	From the <b>Username</b> column, click the link for the card account you wish to view. <i>The Cardholder Details screen displays.</i>
4.	Click the <b>View/Upload Account Documents</b> link that displays on the left-side of the screen. <i>The View/Upload Account Documents screen displays.</i>

Step	Action
5.	<p>To attach a new document:</p> <ol style="list-style-type: none"> <li>Click the <b>Add Document</b> button. <i>The upload window displays.</i></li> <li>In the <b>Document Name</b> field, type the name of the document. There can be no special characters in the document name.</li> <li>Click the <b>Browse</b> button and navigate to the document you want to attach then click the <b>Open</b> button. There can be no special characters in the file name. <i>The upload window displays and the name of the document to be attached displays in the Select File to Upload field.</i></li> <li>Click the <b>Upload</b> button. <i>The document is attached and the name will display on the View Accounts Documents screen.</i></li> </ol> <p>To view an attached document:</p> <ol style="list-style-type: none"> <li>From the <b>Document Name</b> column, click the document you wish to view. <i>The document to be downloaded window displays.</i></li> <li>Click the <b>Download</b> button. <i>A message displays indicating the document may be cached to your computer.</i></li> <li>Click the <b>OK</b> button. <i>A confirmation message displays at the top of the screen.</i></li> <li>To view the attachment, navigate to <b>Recent Download History</b> (Chrome) or <b>Download History</b> (Edge) and click the <b>Open</b> link. <i>The document opens.</i></li> </ol> <p>To delete an attachment:</p> <ol style="list-style-type: none"> <li>Click the <b>Delete</b> link for the document you wish to delete. <i>A confirmation message displays.</i></li> <li>Click the <b>OK</b> button. <i>The document is deleted.</i></li> </ol> <p>To download an attachment:</p> <ol style="list-style-type: none"> <li>Click the <b>Download</b> link that displays at the top of the screen. <i>The format window displays.</i></li> <li>Select the desired format for the download and click the <b>Download</b> button. <i>A message displays indicating the document may be cached to your computer.</i></li> <li>Click the <b>OK</b> button. <i>A confirmation message displays at the top of the screen.</i></li> <li>To view the attachment, navigate to <b>Recent Download History</b> (Chrome) or <b>Download History</b> (Edge) and click the <b>Open</b> link.</li> </ol>

## 4. Manage Card Program

### Transfer Hierarchy (Single and Bulk)

#### Key Concepts

As a Non-cardholder you can transfer Cardholder accounts (single or in bulk) from one hierarchy to another, provided they are within your span of control. The hierarchy the Cardholder accounts are being transferred from as well as the one they are being transferred to must be within your span of control.

When multiple Cardholder accounts are transferred from a hierarchy with the same billing date, the accounts will be visible to the gaining unit on the next business day.

When multiple Cardholder accounts are transferred from a hierarchy with a different billing date, the accounts will be visible to the gaining unit one day following the close of the losing unit's billing cycle as long as there are no recent transactions. Otherwise, the accounts will be visible to the gaining unit one day following the close of the losing unit's billing cycle.

For a newly created business unit, Citi must transfer at least one account into the unit before an account can be transferred using this procedure.

You can also transfer a single Cardholder using the steps in the **View/Transfer Cardholder Hierarchy** topic in this User Guide.

#### Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Card Program</b> drop-down menu and click the <b>Bulk Hierarchy Transfer</b> link. <i>The Bulk Hierarchy screen displays.</i>
2.	Select the radio button for the receiving hierarchy where the accounts will be transferred.
3.	Click the <b>Transfer Hierarchy</b> button. <i>The Hierarchy Transfer — Search screen displays.</i>
4.	To perform a search, type the desired search criteria and click the <b>Search</b> button.  To search for users at a specific hierarchy level, click the <b>Lookup Hierarchy</b> link. If necessary, click the <b>(+) plus sign</b> icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the <b>Select</b> button.  <i>The search results display at the bottom of the screen.</i>  <b>Note:</b> To sort the results by the <b>Card Number</b> , <b>Username</b> , <b>Card Name</b> , <b>Status</b> or <b>Employee ID</b> columns, click the column header name.
5.	From the <b>Card Number</b> column, select the radio button for the card account you wish to transfer and click the <b>Add Account for Transfer</b> link.  <i>A confirmation message displays at the top of the screen indicating the account has been added to the list of accounts to be transferred.</i>
6.	To add additional accounts to be transferred (in bulk), repeat Step 5 for each account to be transferred. When you are finished, continue to Step 7.
7.	When all accounts have been added, click the <b>Continue</b> button. <i>The Transfer Hierarchy Recap screen displays.</i>
8.	Verify the accounts selected for transfer, and click the <b>Continue</b> button.

Step	Action
9.	Click the <b>OK</b> button.  <i>The Transfer Hierarchy History screen displays.</i>

## Download/Upload Bulk Online Applications (BOLA)

### Key Concepts

Bulk Online Applications (BOLA) allows Non-cardholders to initiate a large number of cardholder applications in bulk using a file upload process. When initiating applications in bulk using the Program Administrator to Citi workflow, Cardholders do not need to complete their application manually through the CitiManager Site. If your company is using the Program Administrator to Card Applicant to Citi workflow, Card Applicants are required to enter personal data in the CitiManager Site before the application can be processed.

Refer to the CitiManager Bulk Online Applications/Bulk Online Maintenance User Guide for additional information.

When uploading applications using BOLA:

- Only use the BOLA Form Template downloaded from the correct hierarchy in the CitiManager Site. Copy the hierarchy displayed in the downloaded form to all records in the BOLA Form Template. It's best practice to use one form per one hierarchy.
- Required fields may vary depending on your company setup. Program Administrators need to complete all required fields before uploading the BOLA Form Template. For the Program Administrator to CITI workflow, the Program Administrator is required to complete all card application fields. For the Program Administrator to Card applicant to Citi workflow, the Program Administrator completes the required fields on the BOLA Form Template and once it is submitted, registration details for the CitiManager Site are sent to the Card Applicant and once they register and log in, they will complete the remainder of the fields and submit the application to Citi for processing.
- Do not reorder or delete columns because it will cause your entire spreadsheet to fail.
- You can hide columns you do not use or color code (highlight) them to suit your needs to ensure they are completed. You do not have to make the columns visible or remove the highlights for the spreadsheet to process.
- Country designations in North America are either USA (United States) or CAN (Canada).
- Use a new BOLA Form Template for each bulk upload; do not create a new tab in the same document.
- For optimal processing and reporting results, it's recommended that you limit the number of records loaded per day to 1,000.
- BOLA files process between 8:00 A.M. and 6:00 P.M. EST, Monday through Friday. File cut off times still apply because files that begin at the cut off time must be given time to complete prior to our nightly processing. Processing time for a file is determined by file size and is volume dependent.
- Once you have completed the spreadsheet, it must be uploaded to the CitiManager Site. After it is uploaded, monitor the status and verify if any rows were rejected.
- For Individual Liability programs, once the BOLA has been successfully uploaded and there are no errors, a consent e-mail is sent to Cardholders and they must agree to the terms and conditions before their application is processed. The status of applications can be viewed on the **View Requests** screen and those that are pending Cardholder consent will have a status of **Waiting for email consent**. The consent e-mail will be re-sent automatically at a frequency based on your company's set-up (e.g. 2, 4, 6, 8, 10 days). The consent e-mail can also be re-sent manually from the **View Request** screen by clicking the **Resend BOLA Email Consent** link displayed on the right-side of the screen. It is not possible to change an incorrect e-mail address for an auto or manual re-send of the e-mail consent. It's recommended that a new BOLA be uploaded with the correct e-mail address and the old application be deleted. Applications that are pending Cardholder consent may be automatically deleted based on your company's setup (e.g. After 60, 90 days). Applications can also be deleted manually from the **View Request** screen by clicking the **Delete Application Request** link on the right-side of the screen. Only applications in **Waiting for email consent** can be deleted. Once the application has been approved, it cannot be deleted by you or Citi. Your company may also be set-up to prevent duplicate applications for someone who has the same name and e-mail address.

## Step-By-Step Instructions

Download the Bulk Online Application Form Template

**Note:** It is recommended you download the Bulk Online Application Form Template each time to ensure you use the most current version.

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Card Program</b> drop-down menu and click the <b>File Management</b> link. <i>The Document Management screen displays.</i>
2.	From the <b>Select Function</b> drop-down list, verify <b>Bulk Online Application</b> is selected. If not, select it from the drop-down list.
3.	From the <b>Select Activity</b> section, select the <b>Download Bulk Online Application Form Template</b> radio button.
4.	Click the <b>Download</b> button. <i>The Download Form Template screen displays.</i>
5.	Click the <b>(+) plus sign</b> icon to expand the hierarchy tree. Select the hierarchy to which you would like the card accounts to be set up and click the <b>Download</b> button. <i>The select format window displays.</i>
6.	Select the <b>Download Excel Template</b> or <b>Download Text Template</b> radio button and click the <b>Download</b> button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i>
7.	Click the <b>OK</b> button. <i>A message displays indicating your document downloaded successfully.</i>
8.	To open the form, navigate to <b>Recent Download History (Chrome)</b> <b>Download History (Edge)</b> and click the <b>Open</b> link. <i>The BOLA Form Template opens in selected format.</i>
9.	Complete the required fields and save the document to your computer's hard drive. Refer to the <b>Complete the Bulk Online Application Form Template</b> topic for additional information about completing and saving the spreadsheet.

Complete the Bulk Online Application Form Template

**Note:** You can make formatting changes, such as hiding unneeded columns or highlighting mandatory fields. Do not change the text in the headers or delete or move any columns.

Step	Action
1.	Populate the <b>BOLA Form Template</b> with all the required information.  <b>Note:</b> The <b>PA E-mail Address</b> is populated based on the profile of the user who downloaded the form. The <b>Form ID</b> , <b>PA E-mail</b> and the <b>Identifier for Card Unit/Hierarchy</b> are pre-filled and are mandatory for each record in the spreadsheet. Please copy this information down to each record.  If your organization manages MCCGs at a Cardholder level, they should be added to the BOLA Form Template.  Refer to row two of the form for field formatting requirements.
2.	When you are finished, save the file as an Excel spreadsheet to your computer's hard drive. From the <b>File</b> menu, select <b>Save As</b> . <i>The Save As window displays.</i>



Step	Action
3.	Navigate to the desired folder location on your computer's hard drive.
4.	<p>In the <b>File name</b> field, type the new name of the spreadsheet.</p> <p><b>Note:</b> The file can be saved using any standard file naming convention however each file that is uploaded must have a unique file name to avoid uploading the same file multiple times and to assist with troubleshooting.</p> <p>The file must be saved in .xls format, not .xlsx or an error will occur.</p>
5.	<p>Click the <b>Save</b> button.</p> <p><i>The file is saved to your computer's hard drive and is ready to be uploaded.</i></p>

#### Upload the Completed Bulk Online Application Form

Once you have completed the Bulk Online Application Form Template, it should be uploaded to the CitiManager Site.

Exceptions may occur during processing due to incorrect formatting of fields or the omission of mandatory fields. Applications will not be processed until errors are resolved. Additionally, for Individual Liability programs, the e-mail consent will not be sent to Cardholders. View the Download Bulk Online Application History to view the errors and download the file to remediate them.

Step	Action
1.	<p>From the navigation bar, position your mouse over the <b>Manage Card Program</b> drop-down menu and click the <b>File Management</b> link.</p> <p><i>The Document Management screen displays.</i></p>
2.	From the <b>Select Function</b> drop-down list, verify <b>Bulk Online Application</b> is selected. If not, select it from the drop-down list.
3.	<p>From the <b>Select Activity</b> section, select the <b>Upload Bulk Online Application Data File</b> radio button.</p> <p><i>The Upload Bulk Online Application Data File section displays.</i></p>
4.	<p>From the <b>Upload Bulk Online Application Data File</b> section, click the <b>Browse</b> button and navigate to the completed Excel file (.xls not .xlsx format) saved locally to your computer's hard drive. Select the file and click the <b>Open</b> button.</p> <p><i>The file name displays in the field to the left of the Browse button.</i></p>
5.	<p>Click the <b>Upload</b> button.</p> <p><i>The CitiManager Site processes the file and confirmation message displays at the top of the screen.</i></p>

## Review/Remediate the Status of Records Submitted in the BOLA File

Successful Excel files will process without further action. Exceptions that occur will not generate an e-mail and must be reviewed in the **Error Description** file. Any record found in the error file has not been transmitted to Citi for processing. You can resubmit the rejected applications by downloading the **Original Error File** (\_ERR.xls) and using that Excel file to remediate the errors and resubmit them. Only include the rejected applications from this file when resubmitting, not the ones that already processed.

Only the failed Excel files display in the **Original Error File** column. If there is no file listed, then there were no errors associated with that Excel file. However, in cases where the Citimanager Site cannot process the uploaded file (e.g. BOLA uploaded under the BOLM flow or a column was deleted or changed) the entire file will fail and this will be reflected in the **Error Description File** but an **Original Error File** will not be generated because that template cannot be used.

Step	Action
1.	<p>To review the status of the records submitted in the BOLA file, from the <b>Select Activity</b> section, select the <b>Download Bulk Online Application History</b> radio button.</p> <p><i>The Download Bulk Online Application History section displays the list of files uploaded and their status.</i></p> <p><b>Note:</b> The status and the date the file was uploaded display at the bottom of the screen. You can also view a copy of the completed BOLA file that was uploaded, a file containing only the accounts that errored, and the error log.</p>
2.	<p>To view a copy of the completed BOLA file that was uploaded:</p> <ol style="list-style-type: none"> <li>From the <b>Select Activity</b> section, verify the <b>Download Bulk Online Application History</b> radio button is selected. <i>The Download Bulk Online Application History section displays.</i></li> <li>From the <b>Uploaded/Arrived File</b> column, click the link for the date you wish to view. <i>The Uploaded File Download window displays.</i></li> <li>Click the <b>Download</b> button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i></li> <li>Click the <b>OK</b> button. <i>A message displays indicating the file has downloaded successfully.</i></li> <li>To view the file, navigate to <b>Recent Download History</b> (Chrome) <b>Download History</b> (Edge) and click the <b>Open</b> link. <i>A copy of the uploaded BOLA file opens for the selected date.</i></li> </ol>
3.	<p>To view the error description log file and details for the file you uploaded:</p> <ol style="list-style-type: none"> <li>From the <b>Error Description File</b> column, click the link name of the file you uploaded. <i>The Log File Download window displays.</i></li> <li>Click the <b>Download</b> button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i></li> <li>Click the <b>OK</b> button. <i>A message displays indicating the file has downloaded successfully and the browser document options display.</i></li> <li>Click the <b>Open</b> button from the browser document options. <i>The error log file opens.</i></li> <li>Use this file to remediate any errors and then upload it to the CitiManager Site using the steps in the Upload the Bulk Online Application Form Template topic.</li> </ol> <p><b>Note:</b> You can rename the file or keep the same name as the original. Only upload the file with the accounts that did not process in the original file.</p>

Step	Action
4.	<p>To open a copy of the Excel file that contains errors:</p> <ol style="list-style-type: none"> <li>From the <b>Select Activity</b> section, verify the <b>Download Bulk Online Application History</b> radio button is selected. <i>The Download Bulk Online Application History section displays.</i></li> <li>From the <b>Original Error File</b> column, click the file name link for the desired date. <i>The Uploaded File Download window displays.</i></li> <li>Click the <b>Download</b> button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i></li> <li>Click the <b>OK</b> button. <i>A message displays indicating the file has downloaded successfully.</i></li> <li>To view the file, navigate to <b>Recent Download History</b> (Chrome) <b>Download History</b> (Edge) and click the <b>Open</b> link. <i>A copy of the uploaded BOLA file opens for the selected date.</i></li> </ol>
5.	<p>To view the status of the BOLA requests that were successfully uploaded:</p> <ol style="list-style-type: none"> <li>From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>View Requests</b> link. <i>The Search for Requests screen displays.</i></li> <li>Enter the desired search criteria and click the <b>Search</b> button. <i>The search results display at the bottom of the screen.</i></li> <li>From the <b>Refine By Request Type</b> section, de-select the <b>All</b> checkbox and only select the <b>Bulk online applications</b> checkbox. Click the <b>Search</b> button. <i>The bulk online application requests display.</i></li> <li>To view the request, click the <b>Request ID</b> link. <i>The request selected displays.</i></li> </ol> <p><b>Note:</b> A unique <b>Request ID</b> will generate for each record that was successfully uploaded.</p> <p>The <b>Request ID</b> is used for reference when contacting Citi for assistance, for example if the Cardholder does not receive their card.</p> <p>For Individual Liability Programs and for International Payment Cards a request for consent will be sent to the E-mail addresses of each applicant listed on the BOLA form. These applications will remain in Waiting for E-mail consent status until such time as the applicant clicks the <b>I Agree</b> link in the E-mail.</p> <p>In the event that the consent E-mail is lost, deleted or not received, the E-mail may be re-sent by clicking the <b>Resend BOLA E-mail Consent</b> button located on the <b>View Requests</b> search results screen. Once consent is received, the application will be sent for processing. The status will change to <b>Approved</b> in CitiManager and any issues encountered during processing will be communicated back to you via E-mail.</p>

## Update PA E-mail Address for Status E-mails

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Card Program</b> drop-down menu and click the <b>File Management</b> link. <i>The Document Management screen displays.</i>
2.	From the <b>Select Activity</b> drop-down list, select the <b>Update PA E-mail Address for Status E-mails</b> radio button. <i>The Update PA E-mail Address for Status E-mails section displays.</i>
3.	In the <b>Update PA E-mail Address for Status E-mails</b> text entry field, type the e-mail address for the PA who will receive status e-mails.
4.	Click the <b>Save</b> button. <i>A confirmation message displays indicating the PA Email ID has been saved successfully.</i>

## Download/Upload Bulk Online Maintenance (BOLM) Requests

## Key Concepts

Bulk Online Maintenance (BOLM) allows Non-cardholders to initiate a large number of Cardholder Maintenance requests in bulk using a file upload process.

For individuality billed accounts, a Non-cardholder is not permitted to perform account maintenance on their own account.

When uploading BOLM requests:

- Only use the BOLM Form Template downloaded from the correct hierarchy in the CitiManager Site. Copy the Form ID displayed in the downloaded form to all records in the BOLM Form Template.
- Required fields include the Form ID, the 16-digit account number, Employee ID, or Social Security number (if applicable), as well as any fields that need to be changed. Required fields are dependent on the form.
- Do not reorder or delete columns because it will cause your entire spreadsheet to fail.
- You can hide columns you do not use or color code (highlight) them to suit your needs to ensure they are completed. You do not have to make the columns visible or remove the highlights for the spreadsheet to process.
- Addresses minimally require Address Line 1, City, State and Zip Code in the United States and Address Line 1 City, Province and Canadian Postal Code for Canadian accounts.
- Country designations in North America are either USA (United States) or CAN (Canada).
- Use a new BOLM Form Template for each bulk upload; do not create a new tab in the same document.
- No more than 2,000 records can be added to the Excel spreadsheet.
- BOLM (and BOLA) files process between 8:00 A.M. and 6:00 P.M. EST, Monday through Friday. File cut off times still apply because files that begin at the cut off time have to be given time to complete prior to our nightly processing. Processing time for a file is determined by file size and is volume dependent.
- Once you have completed the spreadsheet, it must be uploaded to the CitiManager Site. After it is uploaded, monitor the status and verify if any rows were rejected.

## Step-By-Step Instructions

Download the Bulk Online Maintenance Form Template

**Note:** It is recommended you download the Bulk Online Maintenance Form Template each time to ensure you use the most current version.

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Card Program</b> drop-down menu and click the <b>File Management</b> link. <i>The Document Management screen displays.</i>
2.	From the <b>Select Function</b> drop-down list, select <b>Bulk Online Maintenance</b> .
3.	From the <b>Select Activity</b> section, select the <b>Download Bulk Online Maintenance Form Template</b> radio button.
4.	Click the <b>Download</b> button. <i>The Download Form Template screen displays.</i>
5.	Select the checkbox for your assigned hierarchy and click the <b>Download</b> button. <i>The select format window displays.</i>
6.	Select the <b>Download Excel Template</b> or <b>Download Text Template</b> radio button and click the <b>Download</b> button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i>
7.	Click the <b>OK</b> button. <i>A message displays indicating your document downloaded successfully.</i>
8.	To view the document, navigate to <b>Recent Download History</b> (Chrome) <b>Download History</b> (Edge) and click the <b>Open</b> link. <i>The BOLM Form Template opens in selected format.</i>
9.	Complete the required fields and save the document to your computer's hard drive. Refer to the <b>Complete the Bulk Online Maintenance Form Template</b> topic for additional information about completing and saving the spreadsheet.

Complete the Bulk Online Maintenance Form Template

**Note:** You can make formatting changes, such as hiding unneeded columns or highlighting mandatory fields. Do not change the text in the headers or delete or move any columns.

Step	Action
1.	Populate the <b>Bulk Online Maintenance Form Template</b> with all the required information. <b>Note:</b> Refer to row two of the form for field formatting requirements. The <b>Form ID, Account Number, Employee ID, or SSN</b> and the fields being maintained are required in each row of the spreadsheet. Be careful not to insert any spaces or extra characters into any unused fields as this will cause errors when the files are processed.
2.	When you are finished, save the file as an Excel spreadsheet to your computer's hard drive. From the <b>File</b> menu, select <b>Save As</b> . <i>The Save As window displays.</i>
3.	Navigate to the desired folder location on your computer's hard drive.

Step	Action
4.	<p>In the <b>File name</b> field, type the new name of the spreadsheet.</p> <p><b>Note:</b> The file can be saved using any standard file naming convention. However, each file that is uploaded must have a unique file name to avoid uploading the same file multiple times and to assist with troubleshooting.</p> <p>The file must be saved in .xls format, not .xlsx or an error will occur.</p>
5.	<p>Click the <b>Save</b> button.</p> <p>The file is saved to your computer's hard drive and is ready to be uploaded.</p>

#### Upload the Completed Bulk Online Maintenance Form

Step	Action
1.	<p>From the navigation bar, position your mouse over the <b>Manage Card Program</b> drop-down menu and click the <b>File Management</b> link.</p> <p><i>The Document Management screen displays.</i></p>
2.	<p>From the <b>Select Function</b> drop-down list, select <b>Bulk Online Maintenance</b>.</p>
3.	<p>From the <b>Select Activity</b> section, select the <b>Upload Bulk Online Maintenance Data File</b> radio button.</p> <p><i>The Upload Bulk Online Maintenance Data File section displays.</i></p>
4.	<p>From the <b>Upload Bulk Online Maintenance Data File</b> section, click the <b>Browse</b> button and navigate to the completed Excel file (.xls not .xlsx format) saved locally to your computer's hard drive. Select the file and click the <b>Open</b> button.</p> <p><i>The file name displays in the field to the left of the Browse button.</i></p>
5.	<p>Click the <b>Upload</b> button.</p> <p><i>The CitiManager Site processes the file and confirmation message displays at the top of the screen.</i></p> <p><b>Note:</b> Exceptions may occur during processing due to incorrect formatting of fields or omission of mandatory fields. Exceptions that occur during this part of the process will not generate an e-mail and must be reviewed in the <b>Error Description</b> file.</p>
6.	<p>To review the status of the records submitted in the BOLM file, from the <b>Select Activity</b> section, select the <b>Download Bulk Online Maintenance History</b> radio button.</p> <p><i>The Download Bulk Online Maintenance History section displays the list of files uploaded and their status.</i></p>
7.	<p>To view a copy of the completed BOLM file that was uploaded</p> <ol style="list-style-type: none"> <li>From the <b>Select Activity</b> section, verify the <b>Download Bulk Online Maintenance History</b> radio button is selected. <i>The Download Bulk Online Maintenance History section displays.</i></li> <li>From the <b>Uploaded/Arrived File</b> column, click the link for the date you wish to view. <i>The Uploaded File Download window displays.</i></li> <li>Click the <b>Download</b> button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i></li> <li>Click the <b>OK</b> button. <i>A message displays indicating the file has downloaded successfully.</i></li> <li>To view the file, navigate to <b>Recent Download History</b> (Chrome) <b>Download History</b> (Edge) and click the <b>Open</b> link. <i>A copy of the uploaded BOLM file opens for the selected date.</i></li> </ol>

Step	Action
8.	<p>To open a copy of the Excel file that contains errors:</p> <p><b>Note:</b> The successful Excel records will process without further action. Only the failed Excel records display. If there is no file listed, then there were no errors associated with that Excel file. However, in cases where the Citimanager Site cannot process the uploaded file (e.g. BOLA uploaded under the BOLM flow or a column was deleted or changed) the entire file will fail and this will be reflected in the Error Description file but an Original Error file will not be generated because that template cannot be used.</p> <p>Any record found in the error file has not been transmitted to Citi for processing.</p> <ol style="list-style-type: none"> <li>From the <b>Select Activity</b> section, verify the <b>Download Bulk Online Maintenance History</b> radio button is selected. <i>The Download Bulk Online Maintenance History section displays.</i></li> <li>From the <b>Original Error File</b> column, click the file name link for the desired date. <i>The Uploaded File Download window displays.</i></li> <li>Click the <b>Download</b> button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i></li> <li>Click the <b>OK</b> button. <i>A message displays indicating the file has downloaded successfully.</i></li> <li>To view the file, navigate to <b>Recent Download History</b> (Chrome) <b>Download History</b> (Edge) and click the <b>Open</b> link. <i>A copy of the uploaded BOLM file opens for the selected date.</i></li> </ol>
9.	<p>To view the error log file and details for the file you uploaded:</p> <ol style="list-style-type: none"> <li>From the <b>Error Description File</b> column, click the link name of the file you uploaded. <i>The Log File Download window displays.</i></li> <li>Click the <b>Download</b> button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i></li> <li>Click the <b>OK</b> button. <i>A message displays indicating the file has downloaded successfully and the browser document options display.</i></li> <li>Click the <b>Open</b> button. <i>The error log file opens.</i></li> </ol>
10.	<p>To view the status of the BOLM requests that were successfully uploaded:</p> <ol style="list-style-type: none"> <li>From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>View Requests</b> link. <i>The Search for Requests screen displays.</i></li> <li>Enter the desired search criteria and click the <b>Search</b> button. <i>The search results display at the bottom of the screen.</i></li> <li>From the <b>Refine By Request Type</b> section, de-select the <b>All</b> checkbox and only select the <b>Bulk online maintenance</b> checkbox. Click the <b>Search</b> button. <i>The bulk online maintenance requests display.</i></li> <li>To view the request, click the <b>Request ID</b> link. <i>The request selected displays.</i></li> </ol> <p><b>Note:</b> A unique <b>Request ID</b> will generate for each record that was successfully uploaded.</p> <p>The <b>Request ID</b> is used for reference when contacting Citi for assistance, for example if there is an issue with the maintenance request.</p>

## Update PA E-mail Address for Status E-mails

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Card Program</b> drop-down menu and click the <b>File Management</b> link. <i>The Document Management screen displays.</i>
2.	From the <b>Select Activity</b> drop-down list, select the <b>Update PA E-mail Address for Status E-mails</b> radio button. <i>The Update PA E-mail Address for Status E-mails section displays.</i>
3.	In the <b>Update PA E-mail Address for Status E-mails</b> text entry field, type the e-mail address for the PA who will receive status e-mails.
4.	Click the <b>Save</b> button. <i>A confirmation message displays indicating the PA Email ID has been saved successfully.</i>

## Download/Upload the Supervisor List

## Key Concepts

If your company requires Supervisors as a secondary approver for card applications you can upload the list of Supervisors who are designated within your company to approve card applications into the CitiManager Site.

The Supervisor List is available only to companies that use the **Card Applicant > Supervisor > Non-cardholder > Citi** online application approval workflow.

The Supervisor List template can be downloaded from the CitiManager Site and a Non-cardholder can update the document with the required Supervisor information. Once the Supervisor list has been completed, the document should be saved to the Non-cardholder's computer and then it can be uploaded to the CitiManager Site.

Once the Supervisor List is successfully uploaded, it is immediately available in the CitiManager Site so Card Applicants can select the approving Supervisor.

When a Supervisor is selected for the first time during the application submission process by an applicant, the Supervisor will receive registration details from Citi. Once the Supervisor registers in the CitiManager Site and creates a log in, they will be able to access application requests submitted for Supervisor approval in the CitiManager Site.



## Step-by-Step Instructions

### Download the Supervisor List Template

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Card Program</b> drop-down menu and click the <b>File Management</b> link. <i>The Upload Bulk Online Application File screen displays.</i>
2.	From the <b>Select Function</b> drop-down list, select <b>Supervisor List</b> . <i>The Download Supervisor List screen displays.</i>
3.	From the <b>Select Activity</b> section, select the <b>Download</b> file radio button.
4.	Click the <b>Download</b> button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i>
5.	Click the <b>OK</b> button. <i>A message displays at the top of the screen indicating your document is ready for download.</i>
6.	To view the file, navigate to <b>Recent Download History</b> (Chrome) <b>Download History</b> (Edge) and click the <b>Open</b> link. <i>The Supervisor List opens in Excel format.</i>
7.	Update the required fields on the Supervisor List template and save the document to your computer.

### Upload the Supervisor List Template

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Card Program</b> drop-down menu and click the <b>File Management</b> link. <i>The Upload Bulk Online Application File screen displays.</i>
2.	From the <b>Select Function</b> drop-down list, select <b>Supervisor List</b> . <i>The Download Supervisor List screen displays.</i>
3.	From the <b>Select Activity</b> section, select the <b>Upload File</b> radio button. <i>The Upload Supervisor List screen displays.</i>
4.	From the <b>Upload File</b> section, click the <b>Browse</b> button and navigate to and select the updated Supervisor list template you saved to your computer and then click the <b>Open</b> button. <i>The file name displays in the field to the left of the Browse button.</i>
5.	Click the <b>Upload</b> button. <i>The file upload confirmation message displays.</i> <b>Note:</b> The uploaded file now becomes the new Supervisor List for your company. The CitiManager Site will retain the most recent Supervisor List uploaded to the system.

## Run Reports

### Key Concepts

Depending on your company's setup, it is possible to run reports from the CitiManager Site. The reports available vary based on your entitlements. Possible reports include:

- CitiManager Non-cardholder Self Registration Pending Report
- CitiManager User Registration Status Detailed Report
- CitiManager User Registration Status Summary Report
- CitiManager BOLA Portfolio Report
- CitiManager BOLM Portfolio Report
- CitiManager BOLA Pending Email Consent Report
- CitiManager OLA Aging Report
- CitiManager OLA Approved Card Report
- CitiManager OLM Aging Report
- CitiManager OLM Approved Maintenance Report
- User Activity Report
- CitiManager Dispute Aging Report

### Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Card Program</b> drop-down menu and click the <b>Reports</b> link. <i>The Search: Reports screen displays.</i>
2.	From the report drop-down list that displays on the right-side of the screen, select the report you wish to run.
3.	If the report you are running requires a date, from the <b>From Date</b> and <b>To Date</b> fields, select the date range for the report. You can further specify the time of day for the date range selected by typing a timeframe in the <b>From Time</b> and <b>To Time</b> fields. The timeframe cannot exceed 31 days.  <b>Note:</b> To run a report for a specific hierarchy, click the <b>Lookup Hierarchy</b> link. If necessary, click the <b>(+) plus sign</b> icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the <b>Select</b> button. When running the User Activity Report, select the sub-report option from the <b>Action Performed</b> drop-down list. If you select the User Activity — Individual Online Maintenance sub-report option, you can enter a 16-digit account number for all maintenance requests on that specific account number. If you enter an account number, no timeframe is required. If no account number is entered, the <b>From Date</b> and <b>To Date</b> fields are required and the timeframe cannot exceed 31 days.
4.	Click the <b>Generate</b> button. <i>A message displays indicating the download may be cached to your computer.</i>
5.	Click the <b>OK</b> button. <i>A confirmation message displays at the top of the screen.</i>  <b>Note:</b> A report can only return 1,200 records at a time. If the report exceeds that limit, you will need to refine your search to view the results. If your download doesn't start automatically, please click the <b>&gt;&gt;here</b> link that displays at the bottom of the screen.
6.	To view the report, navigate to <b>Recent Download History</b> (Chrome) <b>Download History</b> (Edge) and click the <b>Open</b> link. <i>The selected document opens in Excel or the Save options window opens.</i>

## Set Alerts for a Specific Hierarchy

### Key Concepts

You can set alerts that will be available to Cardholders in a specific hierarchy within your span of control. This does not select which alerts Cardholders will receive, but it does change which alert options are available to Cardholders. If a hierarchy level is selected and it has lower-level hierarchies attached to it, then all hierarchies that fall under the higher level hierarchy will also have those alerts available.

Setting alerts is entitlement driven, so you may not have access to this functionality if the entitlement has not been granted to you or turned on for your company.

There are two types of alerts you can set as defaults:

- **Transactional Alerts** — An alert is sent when a defined condition or threshold is met, for example an alert is triggered when a payment is received or when a defined percentage of the credit limit is met.
- **Account Alerts** — An alert is sent when there are status changes to the Cardholder account, for example when an address is changed or when a statement is available.

### Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Card Program</b> drop-down menu and click the <b>Set Alerts</b> link. <i>The Select Hierarchy screen displays.</i>
2.	To select the hierarchy where the alerts will be set, click the <b>(+) plus sign</b> icon to expand the hierarchy.
3.	Select the radio button for the desired hierarchy and click the <b>Continue</b> button. <i>The Set Alerts screen displays.</i>
4.	To subscribe to alerts, select the <b>E-mail</b> and/or <b>SMS Text</b> checkbox(es) for each of the alerts you wish to make available to users in this hierarchy.  To unsubscribe to alerts, de-select the <b>E-mail Alerts</b> and/or <b>SMS (Mobile Alerts)</b> checkbox(es) for the alerts you do not wish to have available for users in this hierarchy.  <b>Note:</b> For more information about each alert, position your mouse over the information icon next to the alert name.  Some alerts require you to type or select a threshold setting that will trigger the alert. For example, for the <b>Available Credit Remaining %</b> alert, you must select the desired <b>Available Credit Remaining %</b> . When the selected percent of remaining credit level is met, you will receive an alert.
5.	When you are finished, click the <b>Continue</b> button. <i>The Preview and Confirm screen displays.</i>
6.	Review the alerts selected and if confirmed, click the <b>Save</b> button. <i>A confirmation message displays indicating the alerts have been set successfully.</i>

## Set Passcode and Pre-fill Application Form Data

### Key Concepts

Once the application criteria for your company has been determined and the application has been created, Citi will attach the application to the appropriate card programs and business units within your company in the CitiManager Site.

In order for applications to process, the Non-cardholder needs to set up a passcode for online applications initiated by a Cardholder. This passcode is sent to each card applicant by the Non-cardholder. The card applicant will also be sent the inviter's e-mail address, which is required to access the application. The inviter's e-mail address must be an e-mail address for a user who has the required hierarchy level and the entitlement to approve applications. In order to approve applications, the user must be active, have the Approve Requests entitlement and sit at or above the hierarchy at which the application is attached.

Non-cardholders may also set pre-filled fields on the application so the data will be consistent for all Cardholders.

Application passcodes can be created with or without an expiration date. If an expiration date is used, a new passcode must be entered once the expiration date has been reached. The same passcode can be reused.

### Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Manage Card Program</b> drop-down menu and click the <b>Set Passcode</b> link. <i>The Set Passcode &amp; Prefill — Set/Change Hierarchy screen displays.</i>
2.	From the <b>Select Hierarchy</b> section, select the radio button for the hierarchy where the passcode will be set. Click the <b>(+) plus sign</b> icon to expand the hierarchy. <b>Note:</b> Only hierarchies in your span of control display. It is possible to set different passcodes for each hierarchy level.
3.	Once the hierarchy for the passcode is selected, click the <b>Save</b> button. <i>The Set/Change Workflow screen displays.</i> <b>Note:</b> Your application workflow displays in the <b>Workflow</b> section. The workflow defines who completes, submits and approves/rejects applications before they are sent to Citi for processing.
4.	In the <b>Passcode</b> field, type the desired passcode. <b>Note:</b> The passcode is case sensitive and has a 20 character limit. Characters can be a combination of alpha/numeric and special characters are allowed.
5.	From the <b>Passcode Expiration</b> section, select the radio button for the desired expiration option. If you select the <b>Allow passcode to expire</b> option, click in the date field and select an expiration date from the calendar. <b>Note:</b> It is recommended you select the <b>Do Not Expire</b> option.
6.	Click the <b>Continue</b> button. <i>The Prefill Data screen displays.</i>
7.	From the <b>Country</b> drop-down list, select the applicable country.
8.	If you want any of the application fields to default so they are consistent for all Cardholders in a hierarchy, type the pre-fill value in the desired field(s) and click the <b>Save</b> link that displays in the bottom left corner of the form. <b>Note:</b> Different defaults can be set for each hierarchy level using a different passcode.
9.	Click the <b>Continue</b> button. <i>The Preview and Confirm screen displays.</i>

Step	Action
10.	<p>Once you are finished previewing, click the <b>Set Passcode</b> button.</p> <p><b>Note:</b> To prevent the form from being locked, it's recommended you do NOT select the checkbox next to the hierarchy.</p> <p><i>The Passcode and form data confirmation message displays at the top of the screen.</i></p>

## View Your Hierarchy

### Key Concepts

You can view hierarchies in your span of control.

**Note:** Hierarchy numbers are seven digits long and there are up to eight levels of hierarchy, depending on how your company's reporting structure is defined at Citi. For Hierarchy Level 1, the leading two digits reference the bank and BIN number. For Hierarchy Levels 2-7, the leading two digits are 00.

The following default hierarchy entitlement(s) information displays:

- **Company Name:** Name of the company to which you belong
- **Unit Name:** Name of the hierarchy to which you belong in the company
- **Unit Number:** Number/node of the hierarchy to which you belong in the company
- **Full Hierarchy:** Complete hierarchy to which you are associated

### Step-by-Step Instructions

Step	Action
1.	<p>From the navigation bar, position your mouse over the <b>Manage Card Program</b> drop-down menu and click the <b>View Hierarchy</b> link.</p> <p><i>The View Hierarchy screen displays.</i></p>
2.	<p>To expand the hierarchies, click the <b>(+) plus sign</b> icon to expand the hierarchy.</p>

## 5. Resources & Tools

### Access Web Tools (Reporting, Expense Management)

#### Key Concepts

The following tools may be accessed based on your entitlements and your company setup:

- Use **Reporting** to run reports using templates or to create custom reports.
- Use **Expense Management** for allocations, reconciliation, as well as program oversight.

#### Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Resources &amp; Tools</b> drop-down menu and click the link for the tool you wish to open. <i>A window opens displaying the roles/programs in which you have entitlements.</i>
2.	If necessary, click the desired hierarchy sub-link. <i>The selected tool launches in a new window or tab.</i>

### Access the Learning Center

#### Key Concepts

The Learning Center is Citi's learning management system that can be accessed from the CitiManager Site.

The Learning Center provides on-demand, self-paced training so you can register for webinars, instructor-led training (ILT), complete computer-based training (CBT) courses and access reference documents 24/7. There are also complete end-to-end user guides and quick-start guides available.

#### Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Resources &amp; Tools</b> drop-down menu and click the <b>Learning Center</b> link. <i>The Learning Center screen displays in a new window or tab.</i>
2.	To access available resources:  In the <b>Search</b> field, type the desired search criteria, for example, <b>CitiManager User Guide</b> , and click the search magnifying glass,  OR  Click the desired <b>Catalog</b> link.

Step	Action
3.	<p>To register for and launch a course:</p> <ol style="list-style-type: none"> <li>Click the three vertical dots and click the <b>Register</b> link.</li> <li>From the <b>Activity Registration</b> screen, verify the activity and click the <b>Add</b> button at the bottom right-side of the screen.</li> <li>Click the <b>Register</b> button on the bottom right side of the screen.</li> <li>Once you have registered for a course or curriculum, click the <b>Start</b> button from the <b>Activities Details</b> screen or your <b>To Do</b> list.</li> </ol> <p>OR</p> <p>To launch and document or computer-based training:</p> <ol style="list-style-type: none"> <li>Click the three vertical dots and click the <b>Start</b> link.  <i>A reference document and computer-based training will launch automatically. If you are opening a computer-based training module, the Learning Activities Details window opens.</i></li> </ol>

## Upload and Download Documents Using the Library

### Key Concepts

The Library allows you to securely share files with Citi.

Folder categories may include:

- Document Sharing
- File Delivery
- Program Reports
- Reference Material
- System Logs

The categories available are based on client requirements so all categories may not be visible to you.

You can download files from all folders categories. You can only upload files if this feature has been activated for your company and you have been granted the entitlement to upload files.

You can only upload documents to folders in the **Document Sharing** category.

### Step-by-Step Instructions

Download a Document from the Library

Step	Action
1.	<p>From the navigation bar, position your mouse over the <b>Resources &amp; Tools</b> drop-down menu and click the <b>Library</b> link.  <i>The Library — Search for Folders screen displays.</i></p>
2.	<p>You can choose to view folders with or without documents by selecting the desired option from the drop-down list that displays in the upper-right corner.</p>
3.	<p>You can perform a search to sort what displays by choosing a folder category and arrival date or typing a folder title. When you are finished, click the <b>Search</b> button.  <i>The document titles that meet the search criteria entered display.</i></p>

Step	Action
4.	<p>To download the most recently uploaded document, click the <b>Download</b> icon.</p> <p>OR</p> <p>To download a different document from the folder, click the <b>Folder Title</b> name and click the <b>Document Title</b> you wish to download.</p> <p><b>Note:</b> The download format defaults to a zip format. To download unzipped documents de-select the zip checkbox.</p>
5.	Click the <b>Download</b> button.
6.	<p>Click the <b>OK</b> button.</p> <p><i>A confirmation message displays indicating the document may be cached to your computer's hard drive.</i></p>
7.	To view the document, navigate to <b>Recent Download History</b> (Chrome) <b>Download History</b> (Edge) and click the <b>Open</b> link.

#### Upload a Document to Library

Step	Action
1.	<p>From the navigation bar, position your mouse over the <b>Resources &amp; Tools</b> drop-down menu and click the <b>Library</b> link.</p> <p><i>The Library — Search for Folders screen displays.</i></p>
2.	<p>To upload a document, click the <b>Upload</b> icon that displays on the right-side of the row for the folder where you want the document to reside.</p> <p><i>The File upload window displays.</i></p> <p><b>Note:</b> You can only upload files to the <b>Document Sharing</b> category if it has been activated for your company and you have been granted permission to upload files.</p>
3.	<p>Click the <b>Choose File</b> button.</p> <p><i>The Choose file window displays.</i></p>
4.	Navigate to and select the file you wish to upload from your computer.
5.	<p>To upload the file, click the <b>Upload</b> button.</p> <p><i>The file is uploaded to the selected folder.</i></p>
6.	<p>Click the <b>Yes</b> button.</p> <p><i>The Document — Document Setting screen displays.</i></p>
7.	<p>Complete the <b>Document Settings</b> fields and click the <b>Save Changes</b> button at the bottom of the screen.</p> <p><i>A confirmation message displays.</i></p>



### Download the Export Log

Step	Action
1.	From the navigation bar, position your mouse over the <b>Resources &amp; Tools</b> drop-down menu and click the <b>Library</b> link. <i>The Library — Search for Folders screen displays.</i>
2.	Click the <b>Export List</b> button that displays at the bottom of the screen. <i>The Export List zip option window option displays.</i>
3.	Choose whether you would like to download the file in zipped format or not and click the <b>Download</b> button. <i>A message displays indicating the file may be saved to your computer.</i>
4.	To view the document, navigate to <b>Recent Download History</b> (Chrome) <b>Download History</b> (Edge) and click the <b>Open</b> link.

### Access Links & Help

#### Key Concepts

You can access a sub-set of User Guides and access program support sites from the **Links/Help** screen. The complete library of User Guides and e-learning modules can be accessed from the Learning Center. Refer to the Access the Learning Center topic in this User Guide for additional information.

#### Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Resources &amp; Tools</b> drop-down menu and click the <b>Links &amp; Help</b> link. <i>The Links/Help screen displays.</i>
2.	Click the link for the resource you wish to access. <i>A message displays indicating you will be opening an external link.</i>
3.	Click the <b>OK</b> button. <i>Depending on the type of resource selected, either the website will open or a message displays indicating the selected document will be cached to your computer's hard drive.</i> <b>Note:</b> When you click on a link for an external site, a new browser opens and you will be directed to the selected site. You will still be logged into the CitiManager Site.
4.	To view the document, navigate to <b>Recent Download History</b> (Chrome) <b>Download History</b> (Edge) and click the <b>Open</b> link.

## View Messages

### Key Concepts

Citi periodically posts system update and maintenance information. This information is posted to the Message Board.

### Step-by-Step Instructions

View Messages

Step	Action
1.	From the navigation bar, position your mouse over the <b>Resources &amp; Tools</b> drop-down menu and click the <b>Messages</b> link. <i>The Messages screen displays.</i>
2.	To view additional information about a message, from the <b>Subject</b> column, click the desired message link. <i>The Messages screen displays and any messages display in the Message Board section.</i>
3.	To return to the list of messages, click the <b>Back</b> button.

## Search for a Non-Cardholder and View their Hierarchy/Role/Full Name and E-mail

### Key Concepts

You can search for Non-cardholders and view the following information:

- Hierarchy Name
- Role
- Full Name
- User Profile E-mail Address

### Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Resources &amp; Tools</b> drop-down menu and click the <b>Search</b> link. <i>The Search for Users screen displays.</i>
2.	To perform a basic search, use the <b>First Name</b> , <b>Last Name</b> or <b>Username</b> fields and click the <b>Search</b> button. <i>The search results display based on the search criteria entered.</i>

## 6. Alerts

### Set Your Personal Alert Subscriptions

#### Key Concepts

As a Non-cardholder, you can set your personal alerts so e-mail notifications are automatically sent to you when certain selected activity occurs to Cardholder accounts in your hierarchy. For example, you can be notified when a transaction is declined.

For certain alerts, you can register to receive alerts from specific hierarchy levels. You will receive a copy of an alert. For the reports listed below, you will only receive the alert if the Cardholder also has the alert enabled:

- Account Over Threshold
- Cancelled Card Transaction
- Card Not Present at Transaction
- Credit Balance on Account
- Declined Transaction
- Payment Due
- Payment Past Due
- Payment Received

#### Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Alerts</b> drop-down menu and then click the <b>Alert Subscriptions</b> link. <i>The Alerts Subscription screen displays.</i>
2.	To enter/edit the e-mail address(es) where you want alerts sent, click the <b>Edit</b> link from the <b>Contact Preferences</b> section and complete the following steps when the <b>E-mail Address Preferences</b> window opens: <ol style="list-style-type: none"> <li>a) Type and confirm up to five e-mail addresses.</li> <li>b) Click the <b>Save</b> button.</li> </ol>
3.	To subscribe to alerts, select the checkbox(es) for each of the alerts you wish to receive. To unsubscribe alerts, de-select checkbox(es) for the alerts you no longer wish to receive. <b>Note:</b> For more information about each alert, click the information icon next to the alert name.
4.	For alerts that allow you to select the hierarchy level, click the <b>Select Hierarchy</b> link. Click the <b>(+) plus sign</b> icon to expand the hierarchy tree.
5.	Select all of the hierarchy levels to which you want to set that alert and click the <b>Select</b> button. <b>Note:</b> You must individually select each hierarchy you want to set. Selecting a higher level does not automatically select the levels below.
6.	Click the <b>Save</b> button. <i>A confirmation message displays indicating the alerts have been set successfully.</i>

## View Alert Audit Log

### Key Concepts

Use the Alert Audit Log to view changes that have been made to alerts. You can view the following:

- The date and time of the change
- Who made the change
- Name of the alert updated
- The previous status and the current status
- Indication that the alert was either an e-mail or mobile alert

### Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Alerts</b> drop-down menu and then click the <b>Audit Log</b> link. <i>The Audit Log screen displays a log of alerts that have been changed.</i>

## View On-Demand Mobile Alert Commands

### Key Concepts

Once your Cardholders have registered their mobile number to receive Citi Alerts, they will have full access to Citi's On-Demand Mobile Alerts. With Citi's On-Demand Mobile Alerts, they can request and receive information from Citi right when they need it.

To receive on-demand alerts from their registered mobile device, they will text the desired command (e.g., HELP) to GOCITI (462484). A list of available commands are available from the CitiManager Site.

For some on-demand mobile alerts the Cardholder is required to enter the last four digits of their account number after the command. For example, to receive account balance information, they would text BAL1234 to GOCITI (462484) where 1234 represents the last four digits of their account number.

Message and data rates may apply.

To view Terms and Conditions, please visit: [Terms & Condition](#)

To view Privacy Policy, please visit:

- [ICG Global Privacy Statement](#)
- [Commercial Cards Privacy Statement \(Outside the US and Canada\)](#)
- [CA Privacy Hub](#)
- [Notice at Collection](#)

### Step-by-Step Instructions

Step	Action
1.	From the navigation bar, position your mouse over the <b>Alerts</b> drop-down menu and click the <b>On-Demand Mobile Alerts</b> link. <i>The On-Demand Mobile Alerts screen displays the commands and a description for each.</i>

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